State of South Dakota

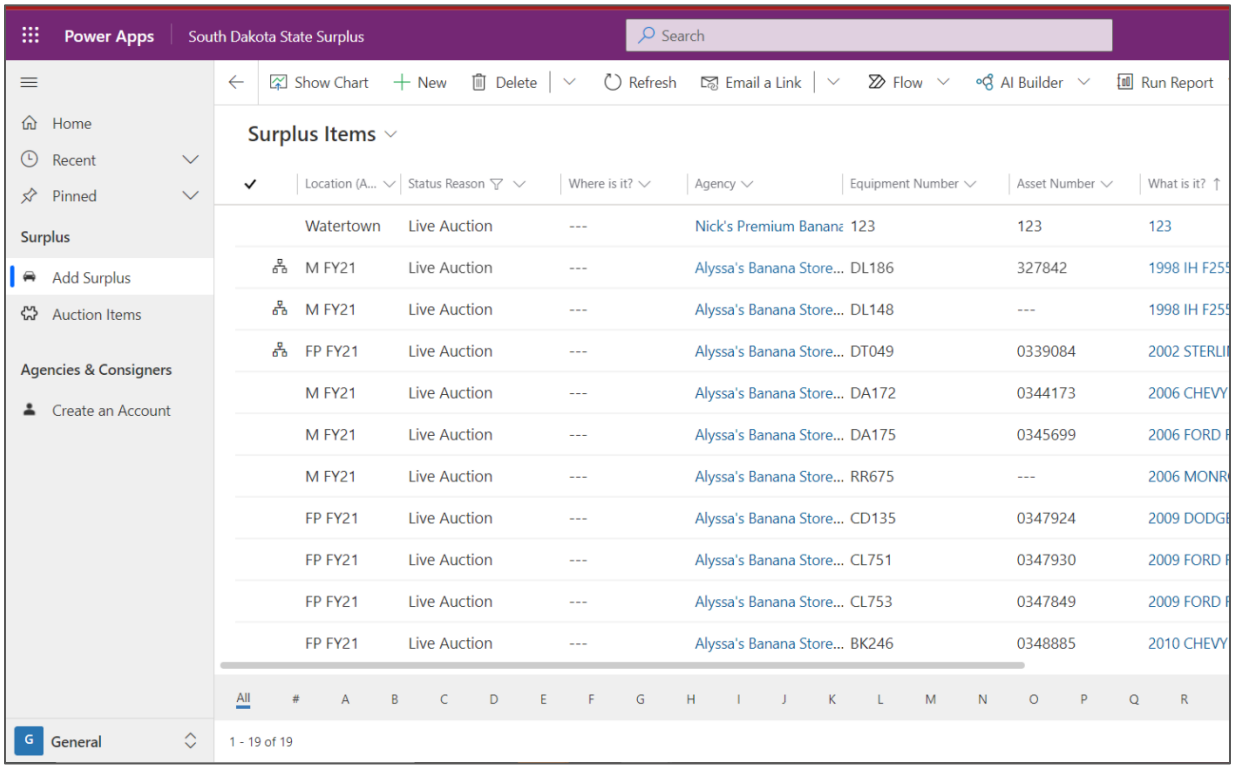
Bureau of Information & Telecommunications

Table of Contents

Section 1: South Dakota State Surplus App

Welcome the South Dakota State Surplus App. You will receive an email that will contain a link to access the app; once in, you will need to bookmark the home page or create a shortcut on your desktop.

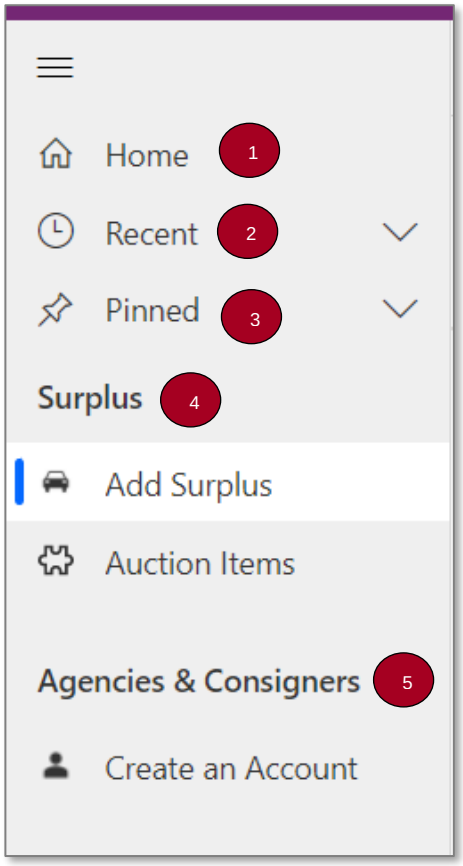
When you first access the application, you will be taken to the Surplus page. This is the home page for the system.



Now let's jump into the App.

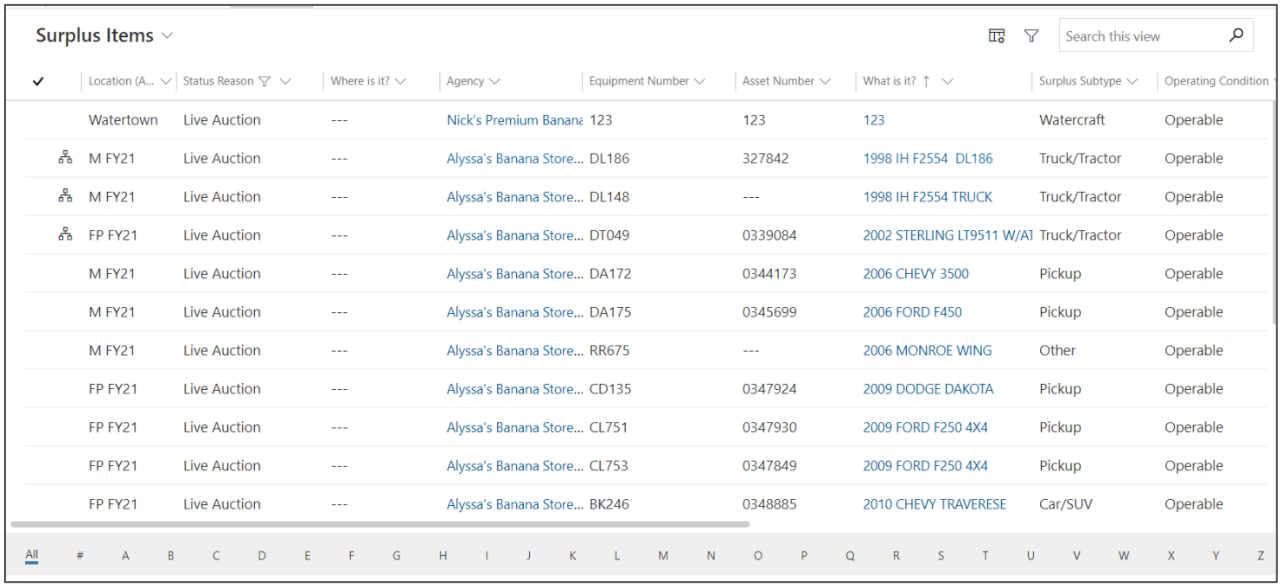
Overview

We will start with an overview of the App. On the left, you will see the Left Menu. This is where you go to be able to jump into the work you need to do or review.



1) **Home:** returns you to the Home page
2) **Recent:** this will show your last 10 views selected
3) **Pinned:** this will contain any views you have 'pinned'
4) **Surplus:** This area is where you create, review, and update surplus items and view items available for auction
5) **Agencies & Consigners:** This area is where you can create, review, and update your agency account.

The main window is your Canvas, this is where your work is done. Whenever you see a linked item, selecting it will navigate you to the page that contains more details about that column. Some of these are just information that is needed elsewhere in the App and you won't need it.



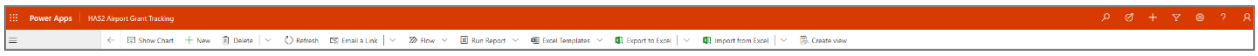
Surplus Items

Search this view

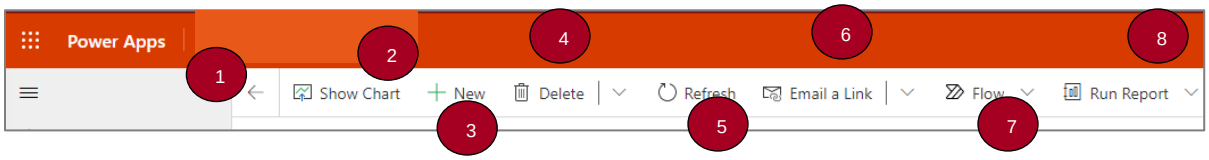
Location (A...	Status Reason	Where is it?	Agency	Equipment Number	Asset Number	What is it?	Surplus Subtype	Operating Condition
Watertown	Live Auction	---	Nick's Premium Banana	123	123	123	Watercraft	Operable
M FY21	Live Auction	---	Alyssa's Banana Store...	DL186	327842	1998 IH F2554 DL186	Truck/Tractor	Operable
M FY21	Live Auction	---	Alyssa's Banana Store...	DL148	---	1998 IH F2554 TRUCK	Truck/Tractor	Operable
FP FY21	Live Auction	---	Alyssa's Banana Store...	DT049	0339084	2002 STERLING LT9511 W/A1	Truck/Tractor	Operable
M FY21	Live Auction	---	Alyssa's Banana Store...	DA172	0344173	2006 CHEVY 3500	Pickup	Operable
M FY21	Live Auction	---	Alyssa's Banana Store...	DA175	0345699	2006 FORD F450	Pickup	Operable
M FY21	Live Auction	---	Alyssa's Banana Store...	RR675	---	2006 MONROE WING	Other	Operable
FP FY21	Live Auction	---	Alyssa's Banana Store...	CD135	0347924	2009 DODGE DAKOTA	Pickup	Operable
FP FY21	Live Auction	---	Alyssa's Banana Store...	CL751	0347930	2009 FORD F250 4X4	Pickup	Operable
FP FY21	Live Auction	---	Alyssa's Banana Store...	CL753	0347849	2009 FORD F250 4X4	Pickup	Operable
FP FY21	Live Auction	---	Alyssa's Banana Store...	BK246	0348885	2010 CHEVY TRAVERESE	Car/SUV	Operable

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

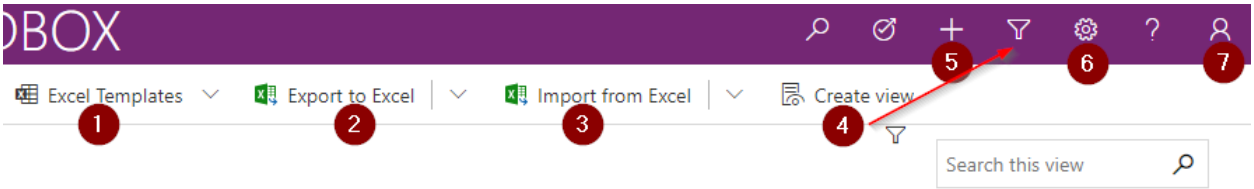
Across the top is the Command Bar, this just gives you some added functionality.



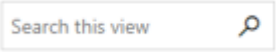
Here is a closer look at this functionality:



1) Users can use the back arrow to return the page they were previously on
2) If charts become available, the charts window can be opened/closed here
3) Clicking New will open the New Airport window
4) Any records in the list view that are selected will be deleted by selecting delete
5) Clicking Refresh will refresh the page view to show additions/subtractions
6) If you select a record(s) you can click Email a Link to bring a link to those files into an Outlook email to send as you wish
7) Flow is just a button used to perform certain automated functions, and will not be used in this app
8) Run Reports is a button to generate a report that has been created for the system, however this system uses Power BI for reporting purposes



1) If Excel templates are created, they can be accessed here
2) If you need to export records housed in your list view to Excel you can do it here; selecting the dropdown will give you some generic file types to export
3) If you need to import data from an Excel spreadsheet, you can start here
4) Create View and the funnel icon do the same thing – they allow you to create your own filtered reports
5) The + opens the Quick Create area; this option is not active currently
6) This is the Settings cog
7) This is your User Profile

There is a Quick Search 

available on the list view also. This is a fast alternative to using the Advanced Find tool (next to the quick search) to locate records within the app

Quick Search does a simple match between the search term and the records in the current view and will display the search results in a filtered view of the entity (record type). Wildcards can be added to the search term by adding the "*" character to the search term. This permits Quick Search to retrieve records that end or begin in the search term.

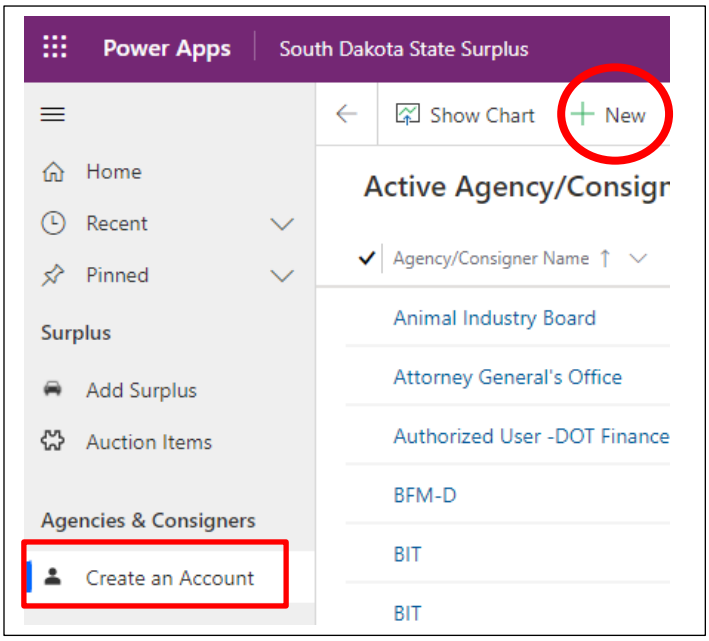
Now we will dive into using the App.

<u>Note:</u> Any fields marked with a * are required fields and must be completed to continue.

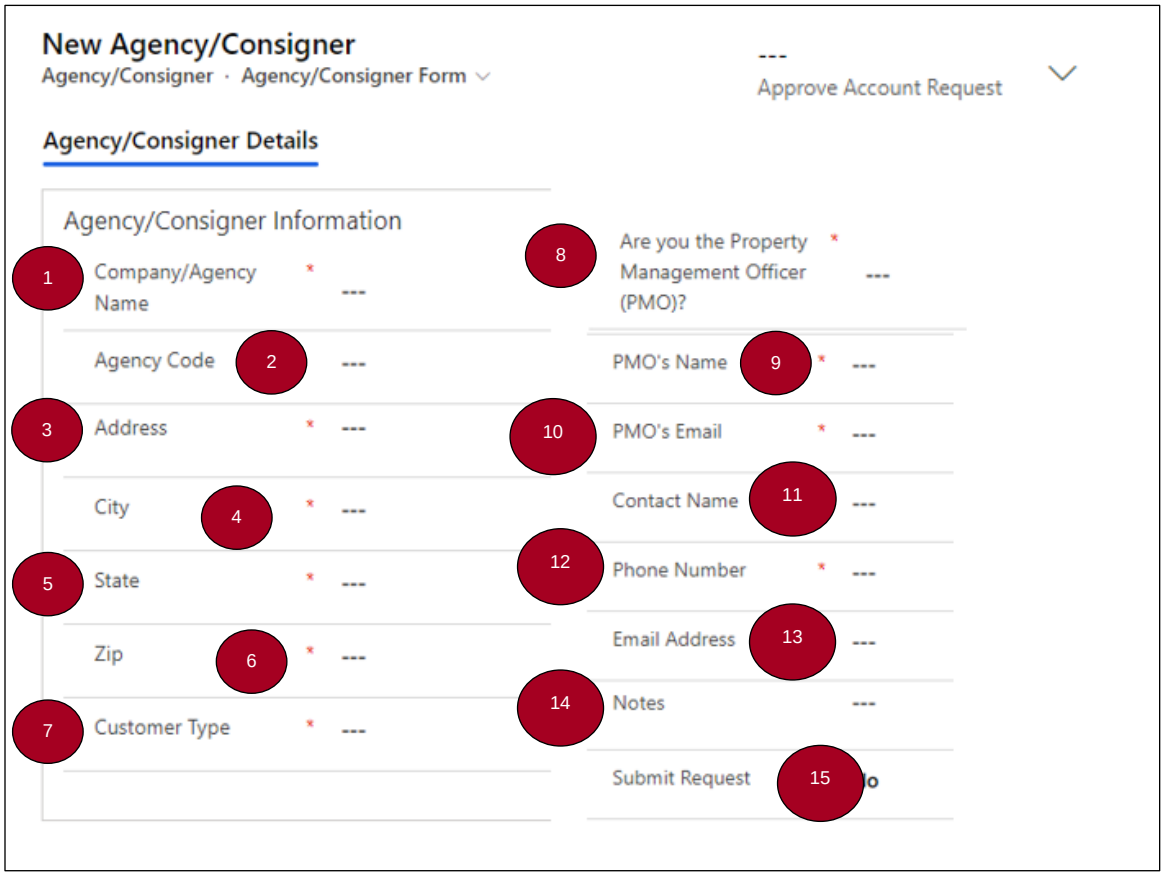
Create an Account

When you begin using the system you will create an account for your agency. There will only be one account per agency (unless otherwise authorized by BOA) and accounts will only need to be created one time, however prior to submitting any surplus forms you must have an existing agency account or create one.

Select ***Create an Account*** on the left-hand navigation tree and click ***New*** in the top command bar



Enter in the necessary information and ***Save*** the record



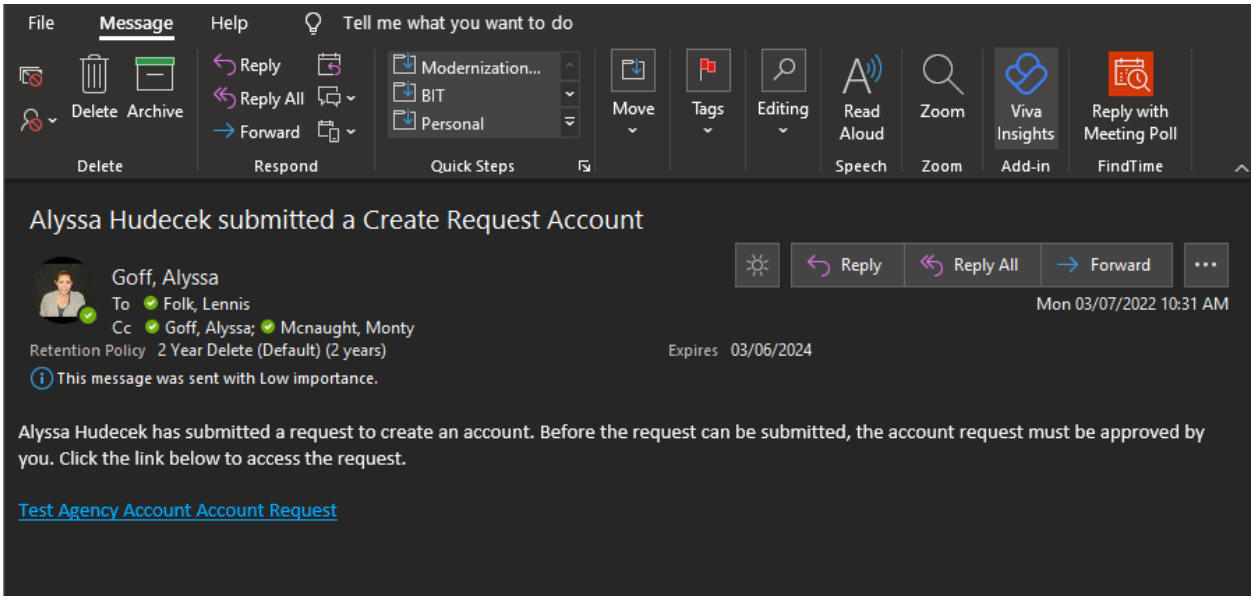
1) **Company/Agency:** Enter in your agency's abbreviation
2) **Agency Code:** Enter in your FAS agency code
3) **Address:** Enter in the address
4) **City:** Enter in the city
5) **State:** Enter in the state
6) **Zip:** Enter in the zip code
7) **Customer Type:** Select your customer type from the drop-down
8) **Are you the PMO?:** Indicate if you are the PMO for the agency
9) **PMO's Name:** Enter the name of the agency PMO
10) **PMO's Email:** Enter in the PMO's email
11) **Contact Name:** Enter the name of the primary contact that should be contacted for questions
12) **Phone Number:** Enter the primary contact's phone number
13) **Email Address:** Enter the primary contact's email
14) **Notes:** Enter in any notes you may have
15) **Submit Request:** Select ***Yes*** to submit the form

Not the PMO

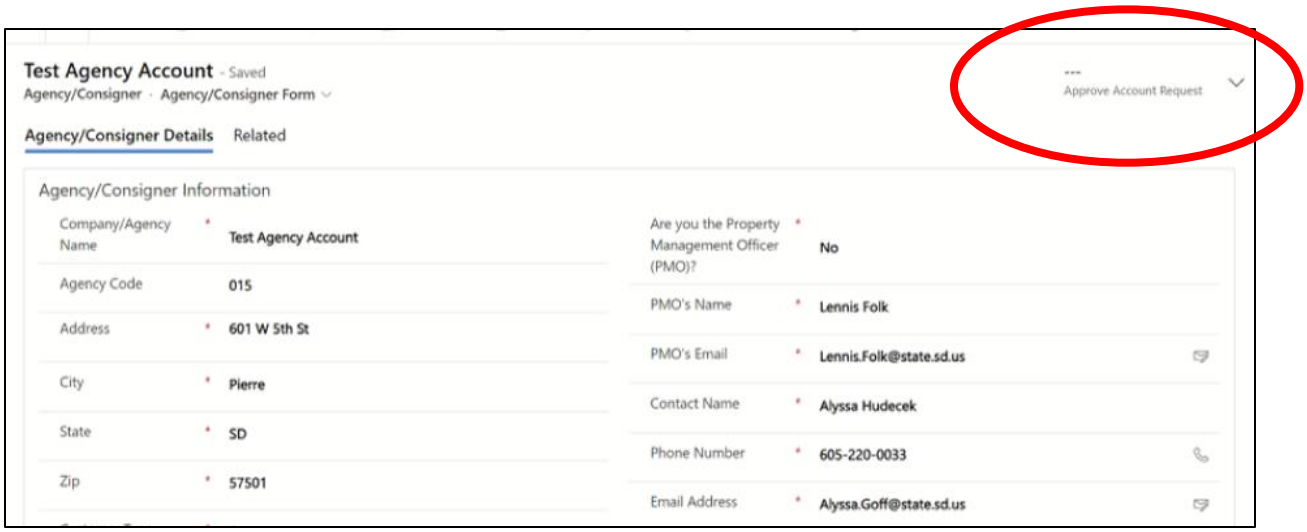
If an authorized user creates the account, an email will first be sent to the PMO for approval. Once the PMO has approved the account the form will be sent to BOA for review

PMO Approvals

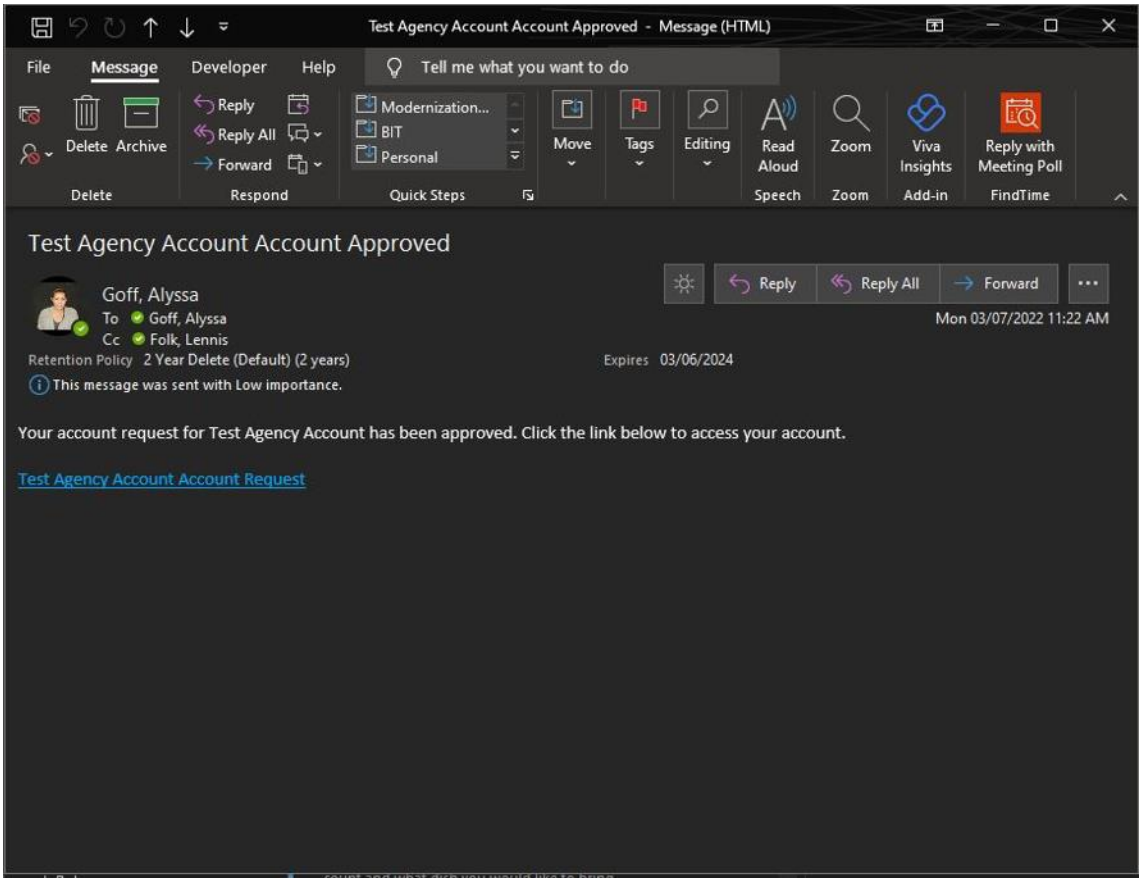
When the PMO receives the email regarding the account creation, there will be a link to the account directly below the email



To approve the request select ***Yes*** from the *Approve Account Request field* in the top right-hand corner of the screen

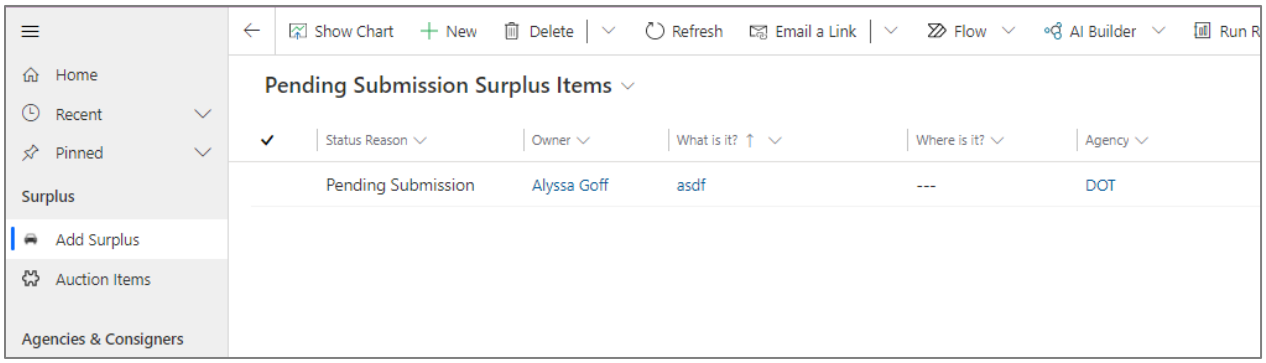


This will trigger an email to be sent to BOA for approval. If you account is approved you will receive an approval notification email

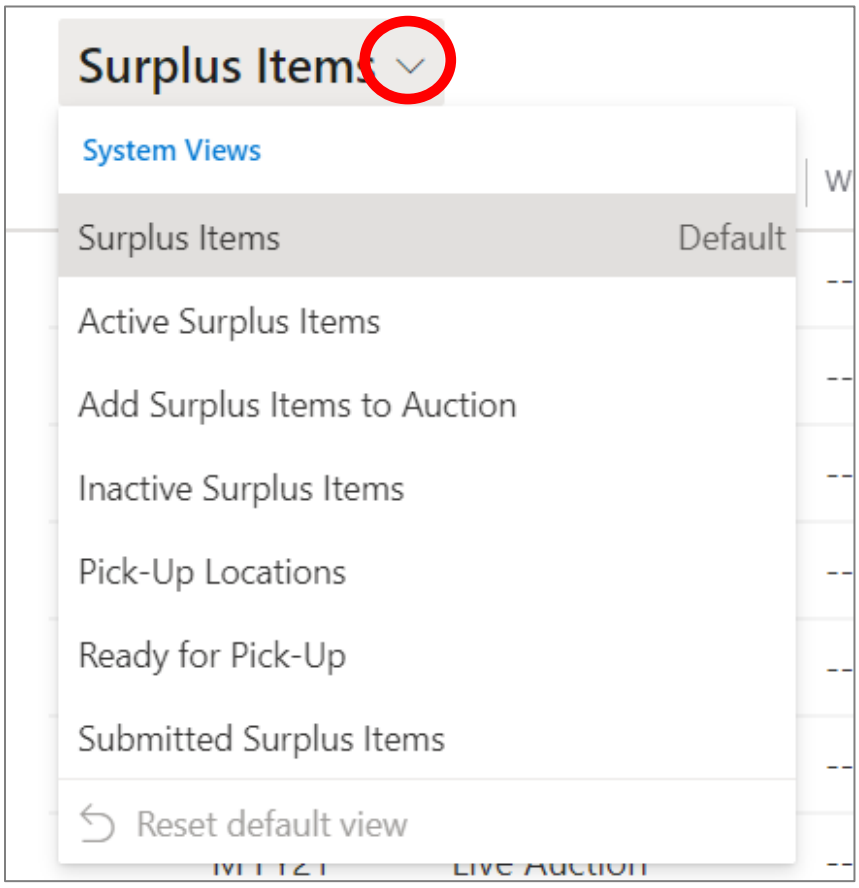


Add Surplus

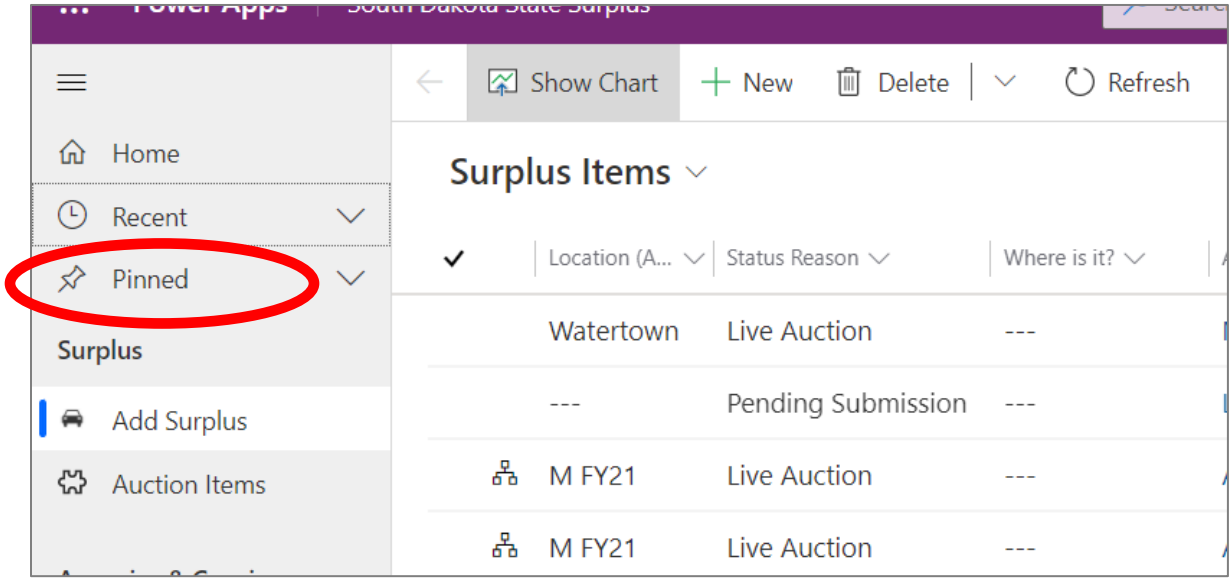
Starting with Add Surplus in the Left Menu, the window will populate with a listing of Surplus item records that have been created. The default is Pending Submission Surplus Items, but this can be tailored.



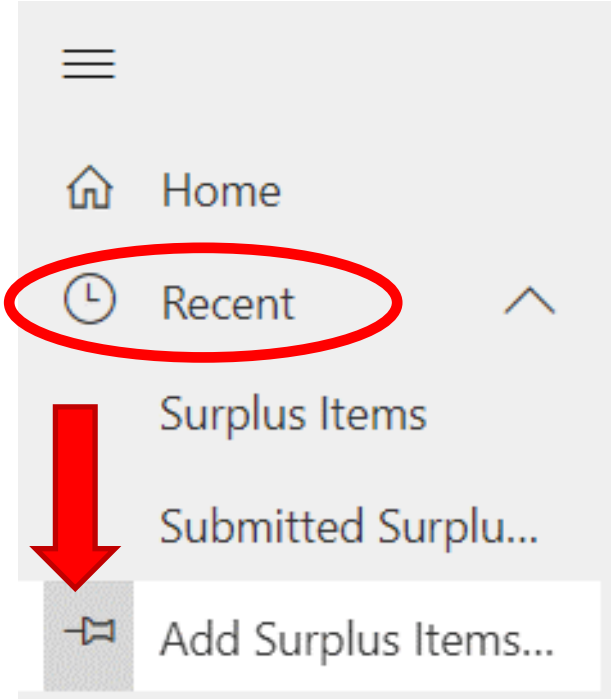
By clicking the dropdown carrot next to 'Surplus Items' on the page; you can see other filtered views. These can be viewed by clicking them to open the filtered view.



If it is a frequent view you visit, you can pin it to your Pinned quick view.



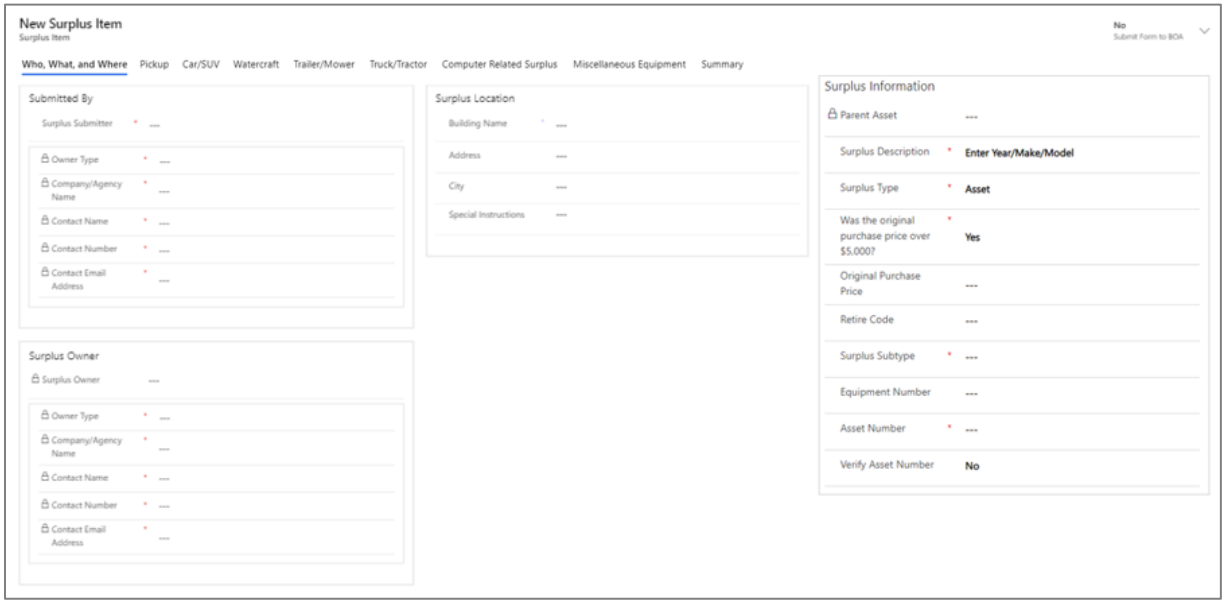
Just click the pin next to the view you want to save under Recent.



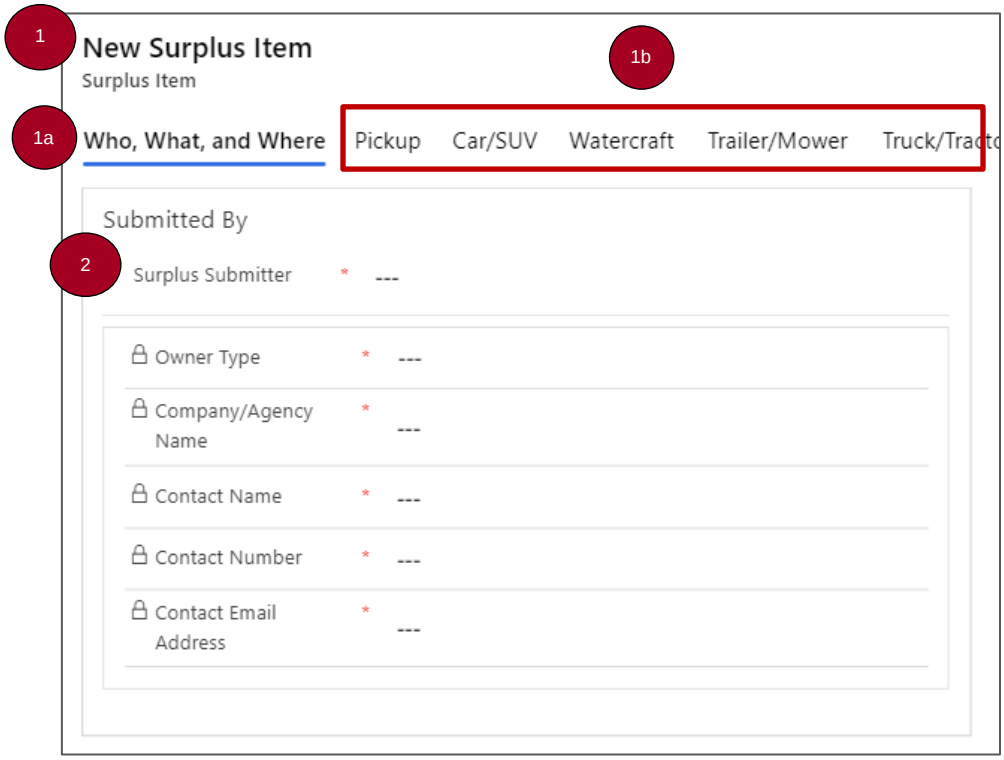
Next, we will look at how to add a Surplus Item

Add a Surplus Item:

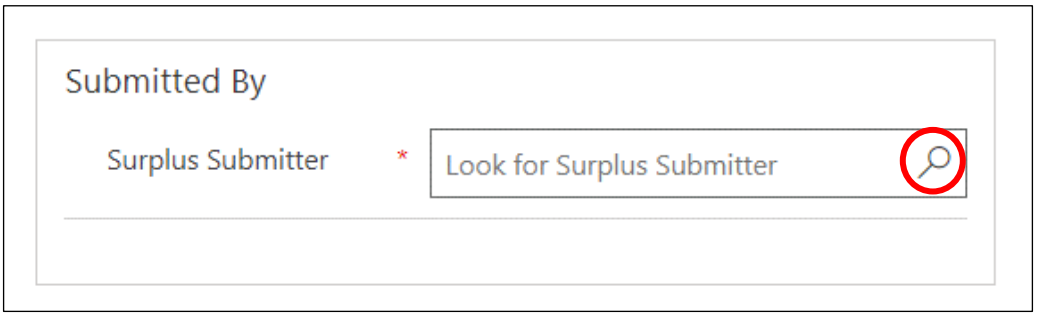
When a surplus item needs to be created a user must first enter in the surplus item's information. Once all the information is entered click ***Save*** or ***Save & Close.***



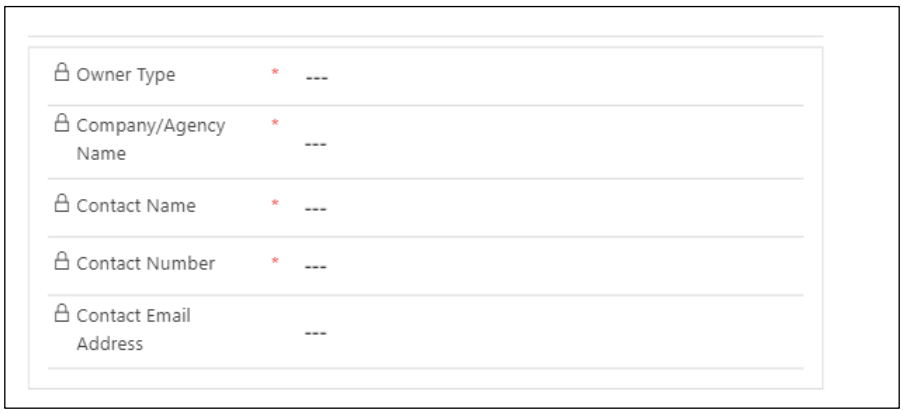
Now let's take a closer look at the form. We will start with the 'Submitted By' section.



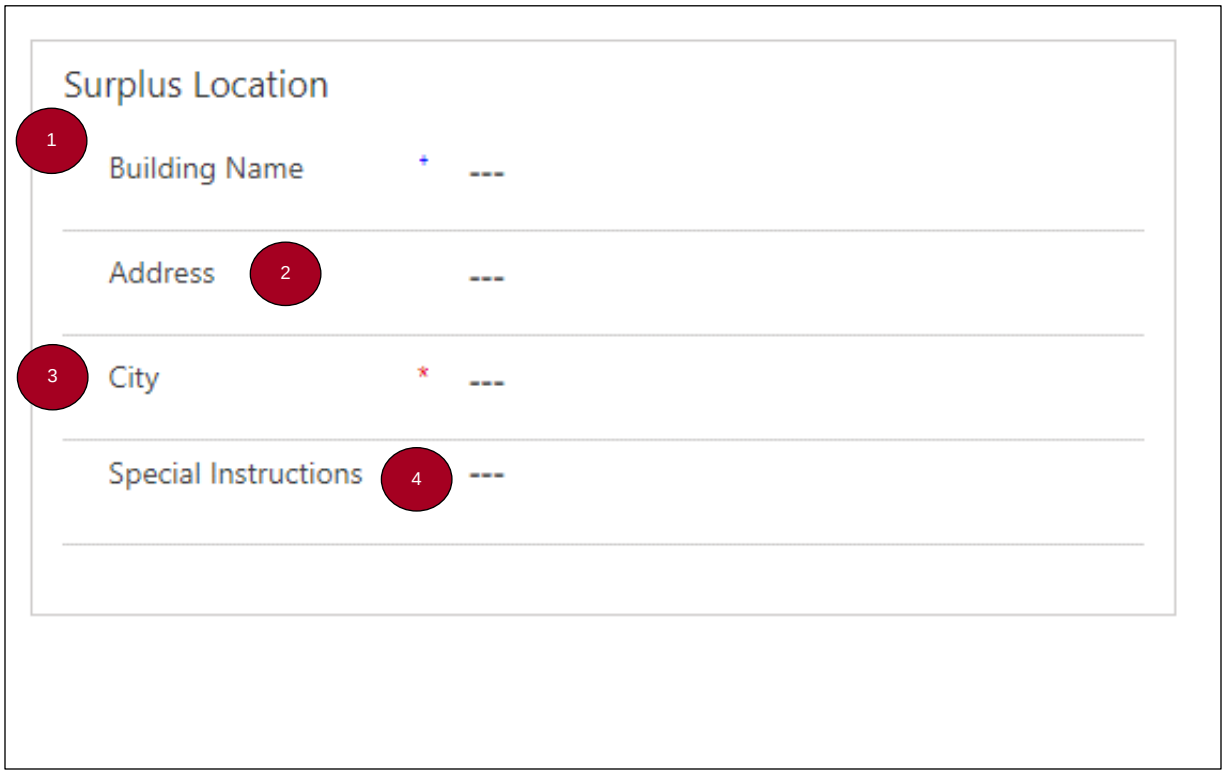
1) **New Surplus Item:** the form consists of two tabs where you will enter in your surplus item's information
    a. ***Who, What, and Where****: this tab will display Surplus item's owner, where the surplus item is located, and what the surplus item is.*
    b. ***Additional Tabs****: after you have selected your subtype you will navigate to one of these tabs to continue completing the form. The tabs are tailored to display and require the applicable information based off the selected subtype.*
2) **Surplus Submitter:** use the magnifying glass to find and select your agency



    a. *If you cannot find your agency in the listing, you will need to request an account in the Create an Account section.* Click here to learn how to request an account.
    b. Once you have found your agency, the account information will populate below.

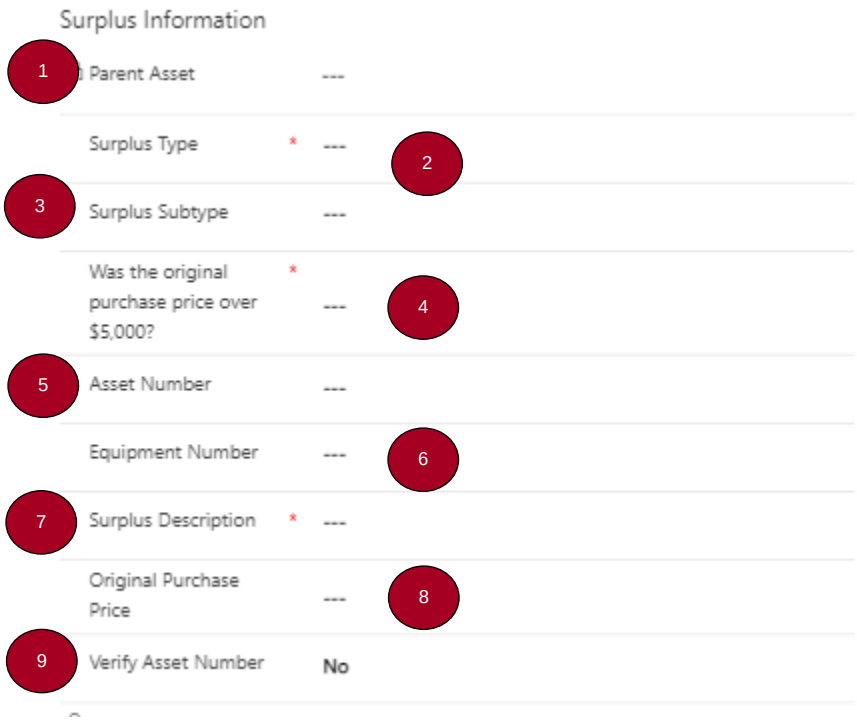


To the right of the ‘Surplus Submitter’ section is the ‘Surplus Location’ section, which we will cover next.



1) **Building Name:** here is where you will enter in the building name where the surplus item is located
2) **Address:** here is where you will enter the address of the item’s location
3) **City:** here is where you will enter the city the item is in
4) **Special Instructions:** here is where you can enter any special pickup instructions

The next section is Surplus Information where you will enter the details of the item you are submitting. There are two types of Surplus types you can choose from, Asset and Non-Asset Equipment.

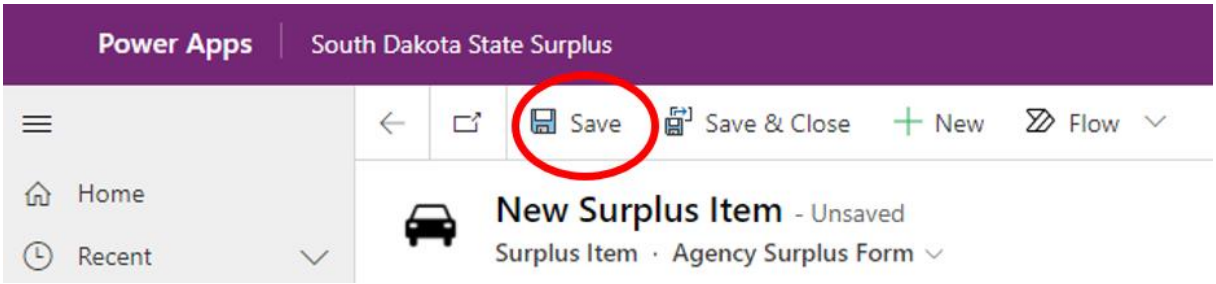


1) **Parent Asset:** This will be a pre-populated field if the asset has attachments
2) **Surplus Type:** Select the Surplus Type from the dropdown
3) **Surplus Subtype:** Select the Surplus Subtype from the dropdown
4) **Original purchase over $5,000?:** Select either yes or no from the dropdown
5) **Asset Number:** Enter in the Asset Number
6) **Equipment Number:** Enter in the Equipment number
7) **Surplus Description:** Enter in the Year/Make/Model of the surplus item
8) **Original Purchase Price:** Enter in the original purchase price of the surplus item
9) **Verify Asset Number:** Select Yes from the dropdown (further detail below)

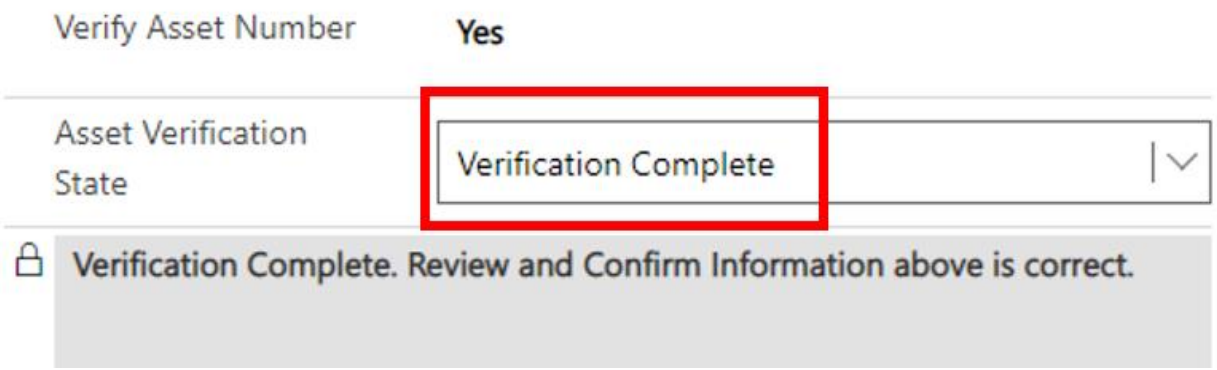
Asset

When a user is completing an Asset as the Surplus type there will be a verification process that must be completed first. To qualify as an asset the original purchase price of the item must be $5,000 or greater. After entering all the needed information select Yes from the Verify Asset Number Dropdown

Next, **Save** the record using the *Save Button* at the top left corner of the record's command bar.

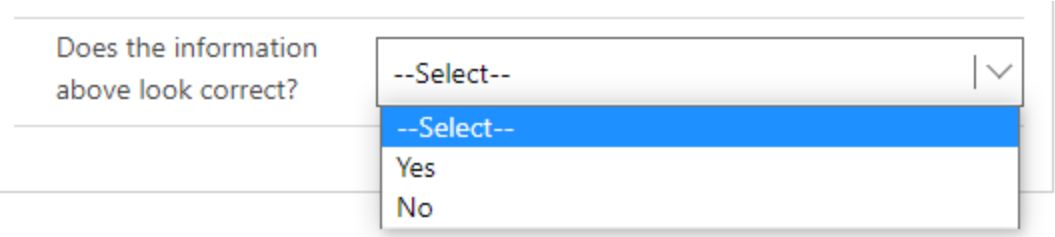


After saving the record refresh the screen using the *Refresh* button on your browser or at the top of the command bar next to the *Save button.* Continue refreshing the screen until *Asset Verification* field shows complete.



IMPORTANT!

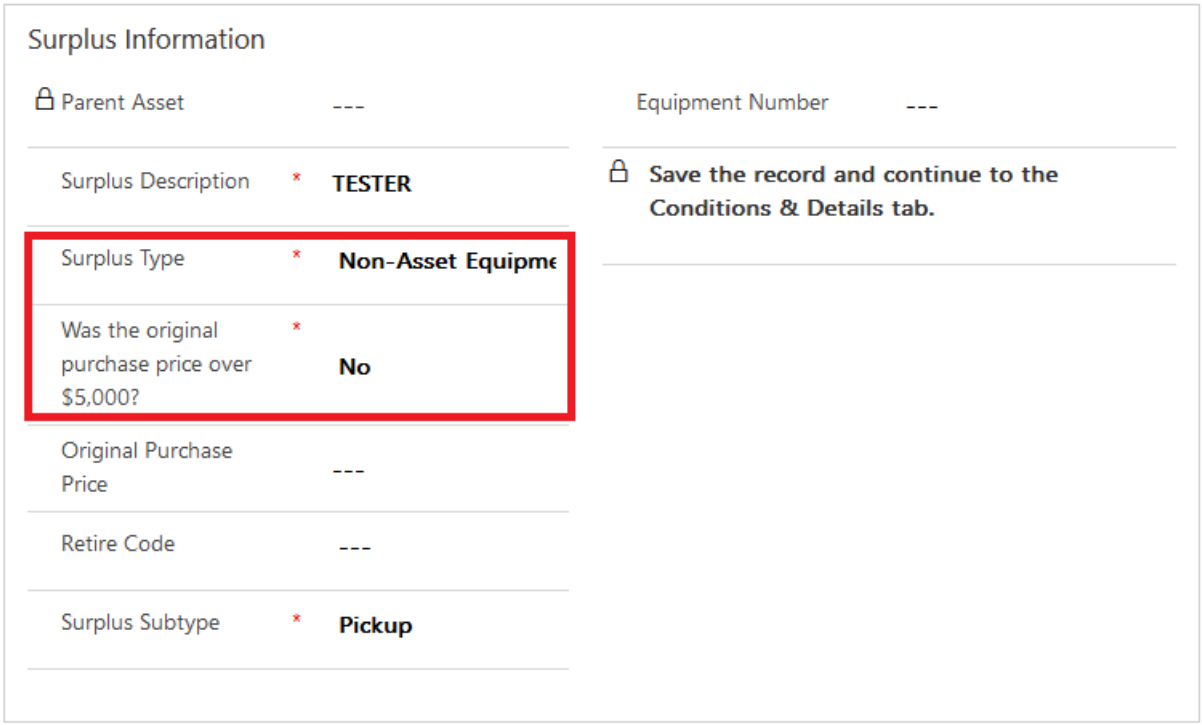
Next, verify that the information you have completed for the first tab (*Who, what, and Where)* Mark the *Does the information above look correct?* dropdown as **Yes** and navigate to the next tab. ***If you do not complete this step, you will not be directed to the appropriate tab***



Before we continue, let's see how to complete the Who, What, Where with the Surplus type of Non-Asset Equipment

Non-Asset

When a user is completing Non-Asset Equipment as the Surplus type the verification process through FAS will not be done. To qualify as a non-asset the original purchase price of the item must be less than $5,000. After entering all the needed information select save at the top of your command bar on the form.



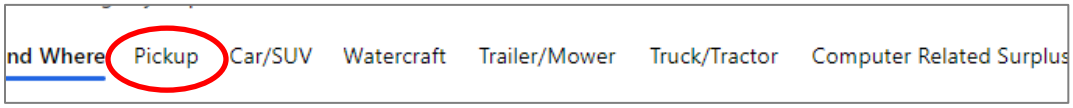
NOTE: You must select 'No when asked if the original purchase price was over $5,000 for it to be a Non-Asset.

Conditions and Details Tabs

After you have completed the Who, What, and Where tab, you will continue to the applicable tab based off the surplus type you selected.

For Example:

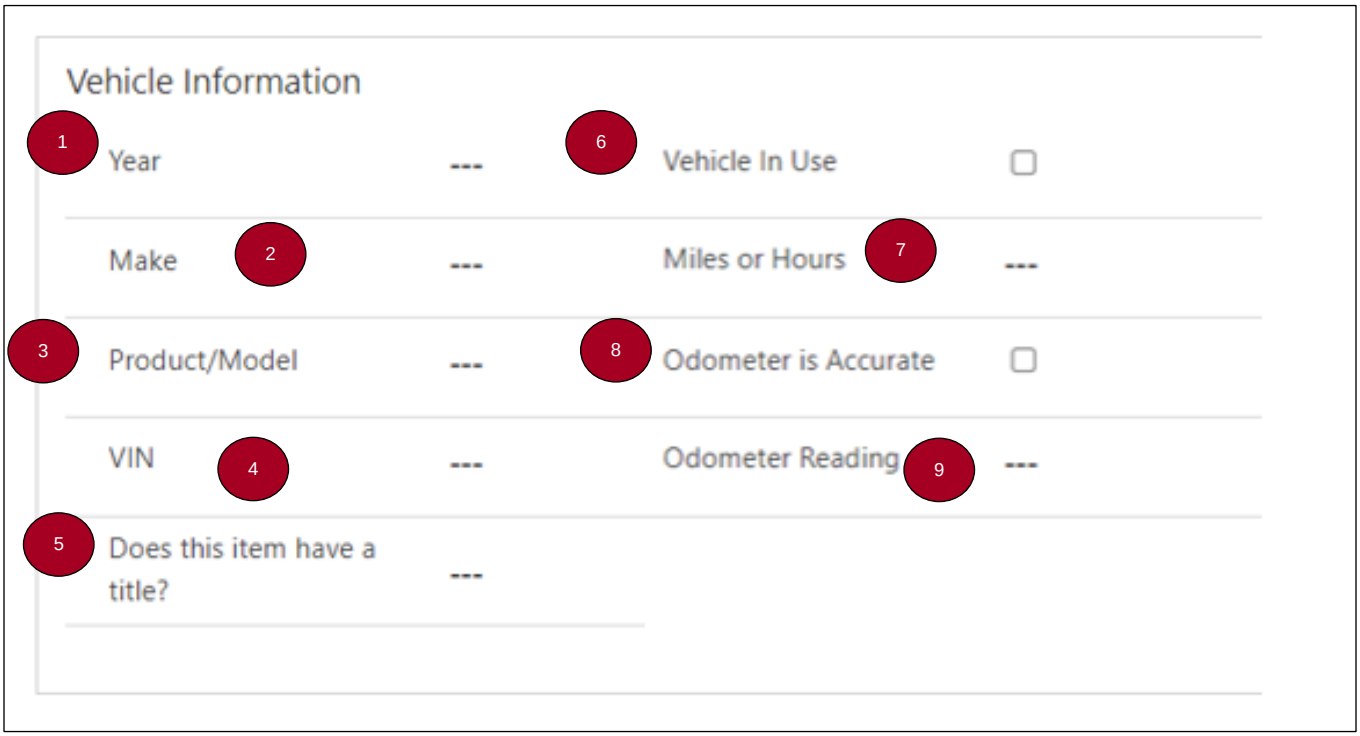
If you selected *Pickup* as your Surplus item's subtype, you would navigate to the Pickup tab.



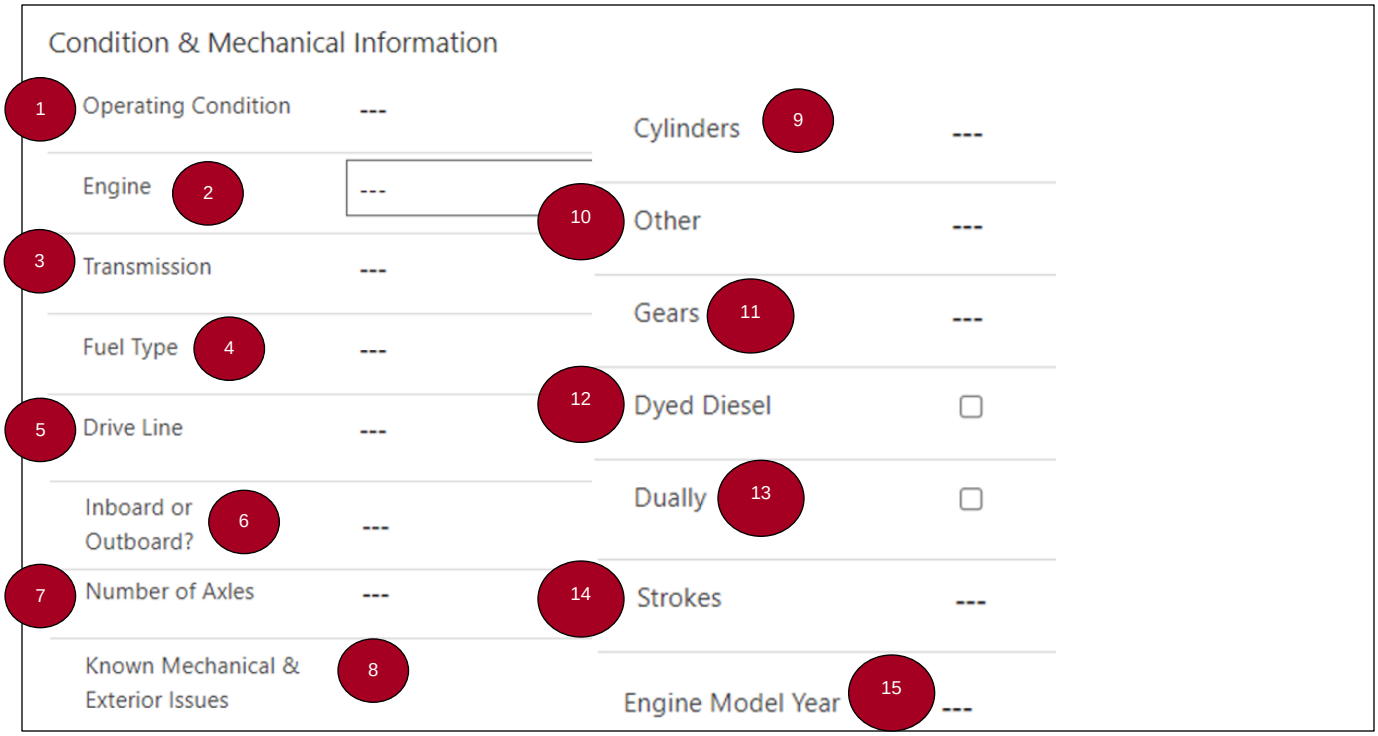
Let's take a closer look at each tab

Pickups, Car/SUVs, and Watercrafts

Pickups, Car/SUVs, Truck/Tractor and Watercrafts require most of the same information when completing a form. If the field does not pertain to all the subtypes, it will be indicated below

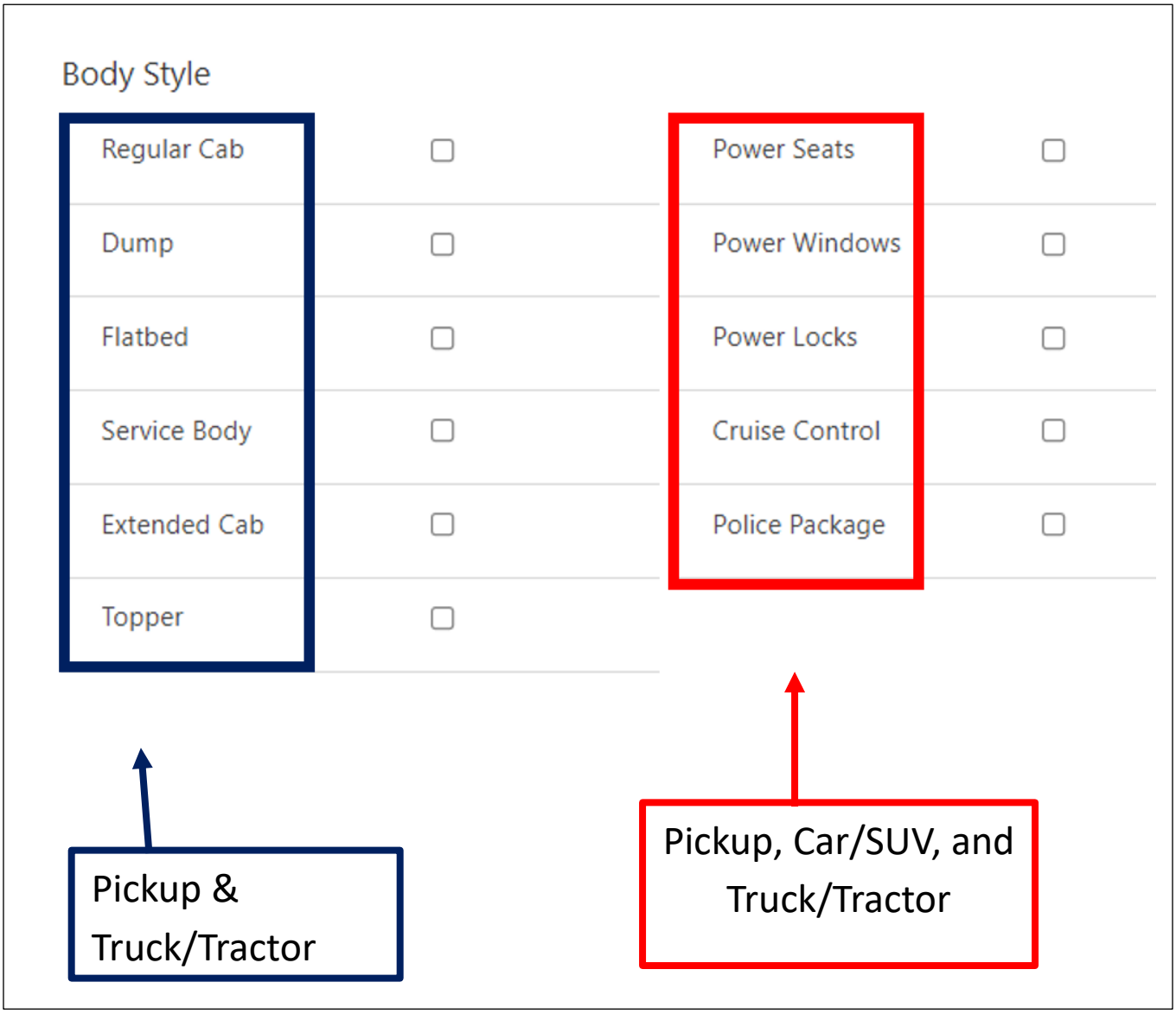


1) **Year:** Enter the year of the vehicle
2) **Make:** Enter the make of the vehicle
3) **Product/Model:** Enter the Product/Model
    a. ***If the item is an asset, it will be auto populated by FAS***
4) **VIN:** Enter the VIN number of the vehicle
    a. **If the item is an asset, it will be auto populated by FAS**
5) **Does this item have a title?:** Select from the dropdown
6) **Vehicle in Use:** Use the checkbox to indicate if the vehicle is in use
7) **Miles or Hours:** Use the dropdown to indicate if the vehicle operates on miles or hours
8) **Odometer is Accurate:** Use the checkbox to indicate if the odometer reading on the vehicle is accurate
9) **Odometer Reading:** Enter in the current odometer reading on the vehicle



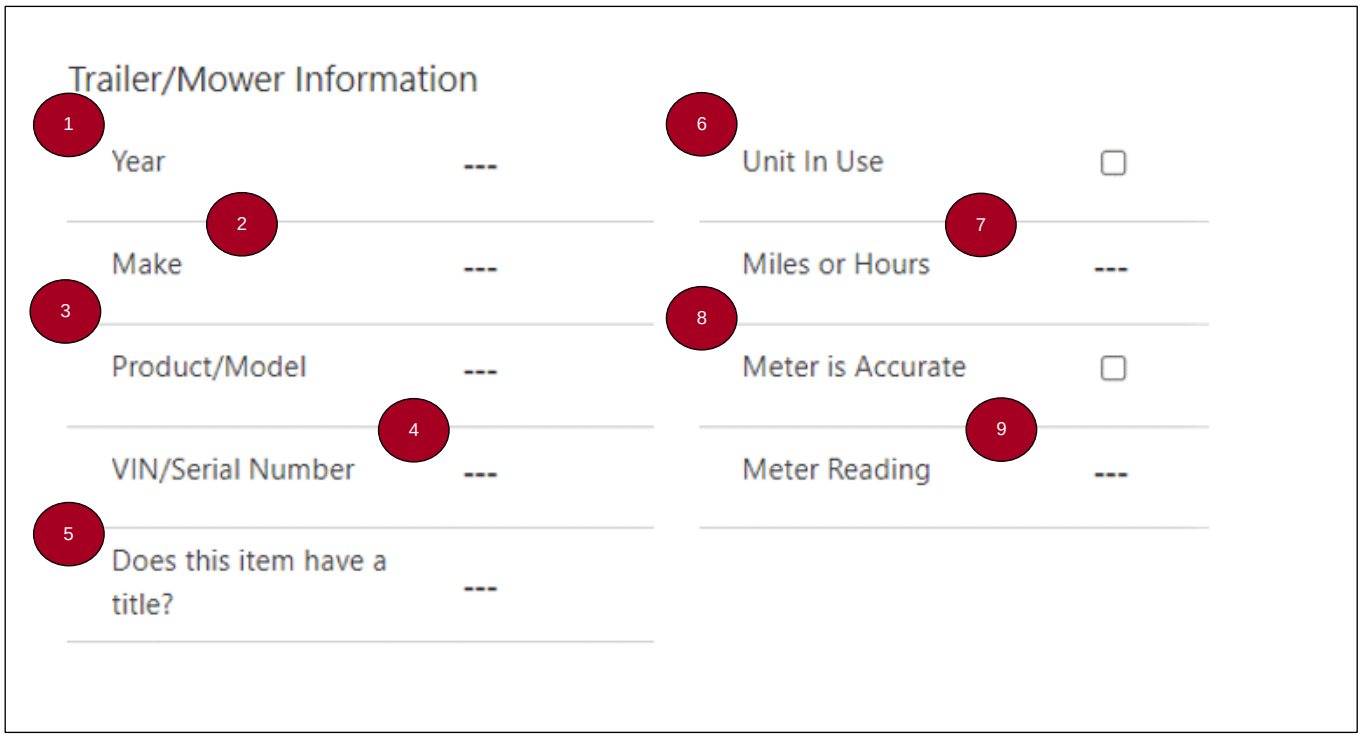
1) **Operating Condition:** Enter
2) **Engine:** Enter in the engine
3) **Transmission:** Select the transmission type from the dropdown
4) **Fuel Type:** Select the fuel type from the dropdown
5) **Driveline:** Select the driveline from the dropdown
    a. ***Pickup & Car/SUV***
6) **Inboard or Outboard?**: Indicate if the unit is inboard or outboard
    a. ***Watercraft***
7) **Number of Axels:** Enter in the number of axels
    a. ***Truck/Tractor***
8) **Known Mechanical & Exterior Issues:** Enter in any known issues
9) **Cylinders:** Select the number of cylinders from the dropdown
10) **Other:** Enter in any other details you would like to provide
11) **Gears:** If the transmission is manual indicate how many gears
12) **Dyed Diesel:** Use the checkbox to indicate if the unit is running on dyed diesel
13) **Dually:** Indicate if the unit is a dually
    a. ***Pickup***
14) **Strokes:** Indicate how many strokes
    a. **Watercraft**
15) **Engine Model Year:** Indicate the Engine Model Year
    a. **Watercraft**

You will use the checkboxes below to indicate if any of these features are a part of your surplus. <u>Watercrafts</u> do not apply to this section

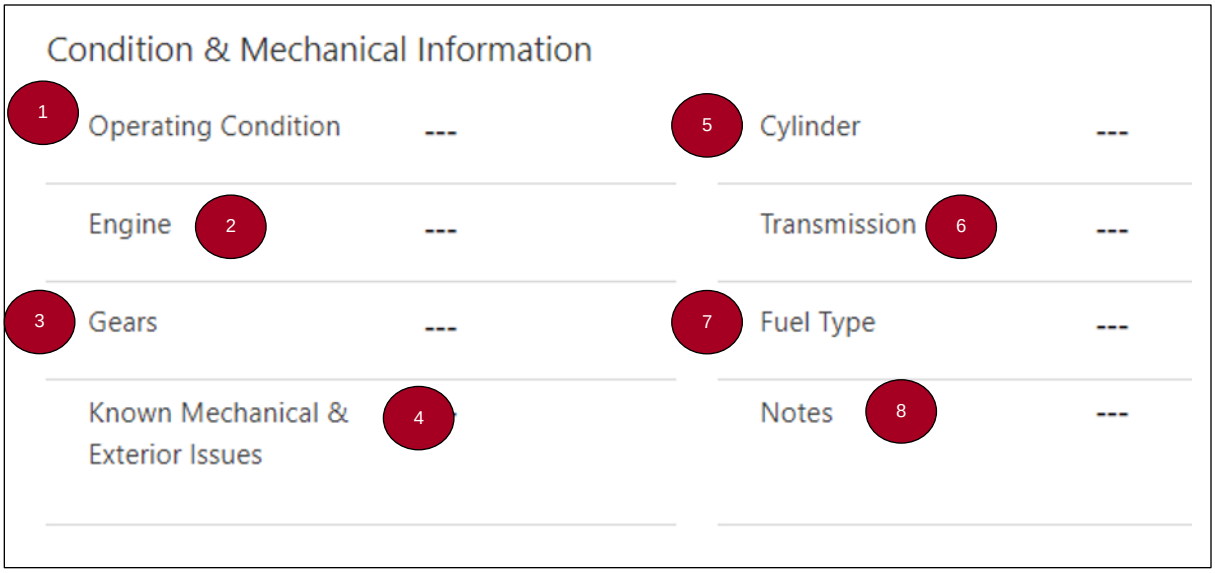


Trailer/Mower

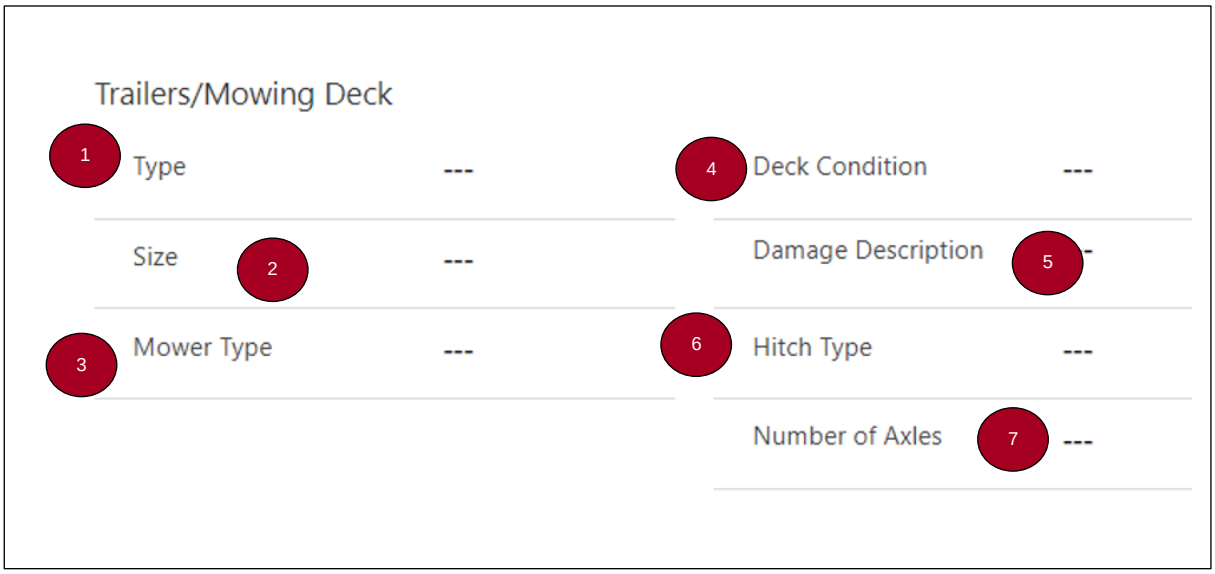
Enter in the following information if the subtype you selected is Trailer/Mower



1) **Year:** Enter the year of the unit
2) **Make:** Enter the make of the unit
3) **Product/Model:** Enter the Product/Model
    a. ***If the item is an asset, it will be auto populated by FAS***
4) **VIN/Serial Number:** Enter the VIN number of the unit
    a. **If the item is an asset, it will be auto populated by FAS**
5) **Does this item have a title?:** Select from the dropdown
6) **Unit in Use:** Use the checkbox to indicate if the unit is in use
7) **Miles or Hours:** Use the dropdown to indicate if the vehicle operates on miles or hours
8) **Meter is Accurate:** Use the checkbox to indicate if the meter reading on the vehicle is accurate
9) **Meter Reading:** Enter in the current meter reading of the unit



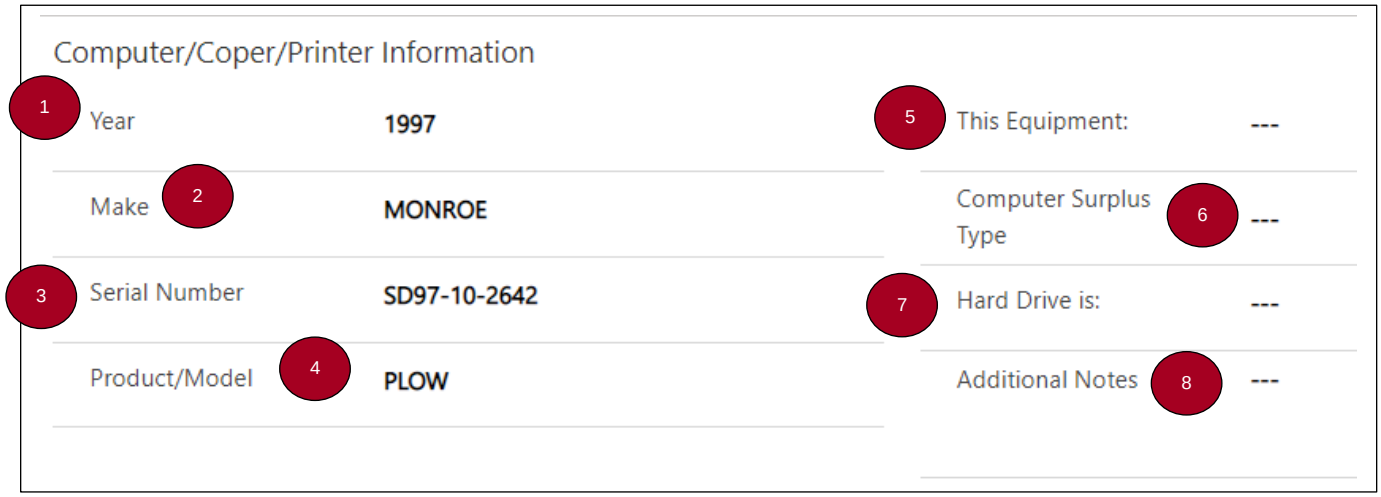
1) **Operating Condition:** Use the dropdown to indicate if the unit is operable
2) **Engine:** Enter in the engine
3) **Gears:** If the transmission is manual indicate how many gears
4) **Known Mechanical & Exterior Issues:** Describe any know mechanical or exterior issues
5) **Cylinder:** Select the number of cylinders from the drop-down
6) **Transmission:** Select the transmission type from the dropdown
7) **Fuel Type:** Select the fuel type from the dropdown
8) **Notes:** Enter any additional notes you may have



1) **Type:** Enter in the type
2) **Size:** Enter in the size
3) **Mower Type:** Select the mower type from the drop-down
4) **Deck Condition:** Select the deck condition from the drop down
5) **Damage Description:** Describe any damage the trailer/Mower may have
6) **Hitch Type:** Select the hitch type from the drop-down
7) **Number of Axles:** Enter the number of axels

Computer Related Surplus

Enter in the following information if the subtype selected is Computer Related Surplus



1) **Year:** Enter in the year of the equipment
2) **Make:** Enter in the make of the equipment
3) **Serial Number:** Enter in the serial Number of the equipment
4) **Product/Model:** Enter in the Product/Model of the equipment
5) **This Equipment:** Select the applicable option from the dropdown
6) **Computer Related Surplus Type:** Select the applicable option from the dropdown
7) **Hard Drive is:** Select the applicable option from the dropdown
8) **Additional Notes:** Enter in any notes or comments you may have about this item

Miscellaneous Equipment

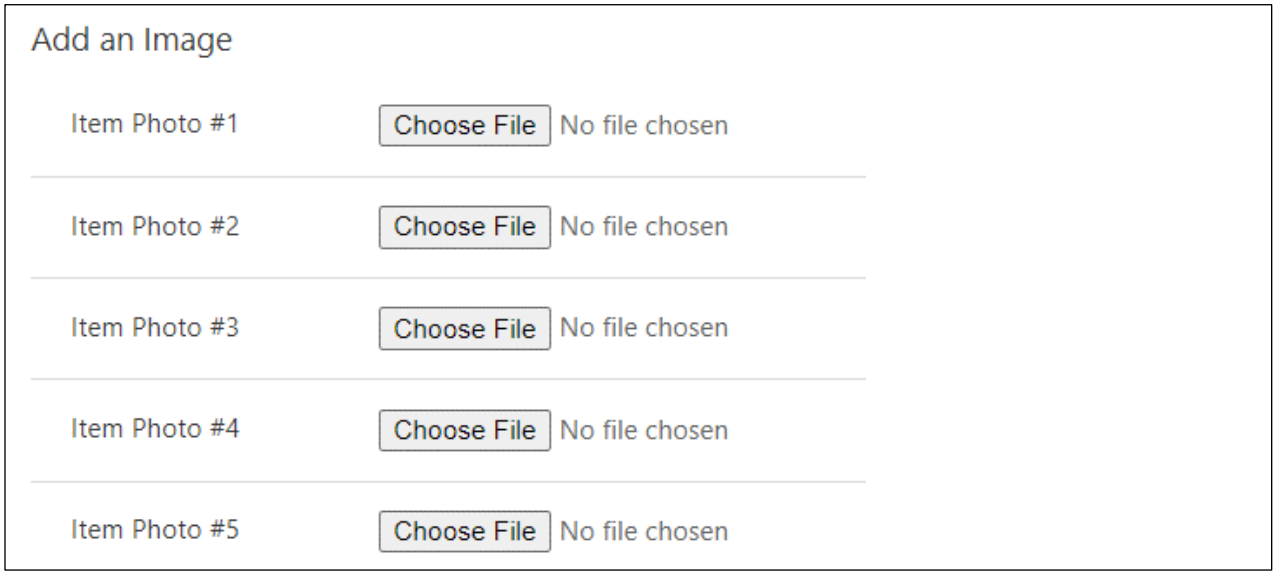
Enter in the following information if the subtype selected is Computer Related Surplus

1) **What is it?:** Enter in what the equipment item is
2) **Year:** Enter in the equipment's year
3) **VIN-Serial Number-Other ID:** Enter in the equipment items ID number
4) **Does this item have a title?**: Indicate if the item has a title
5) **Make:** Enter in the make of the equipment item
6) **Product/Model:** Enter in the Product/Model of the equipment item

1) **Known Mechanical/Exterior Issues:** Enter any known mechanical or cosmetic issues
2) **Additional Notes:** Enter in any notes or comments you may have about this item

All Tabs

Every tab will have a grid to add images and to add attachments to the Surplus Item record you created

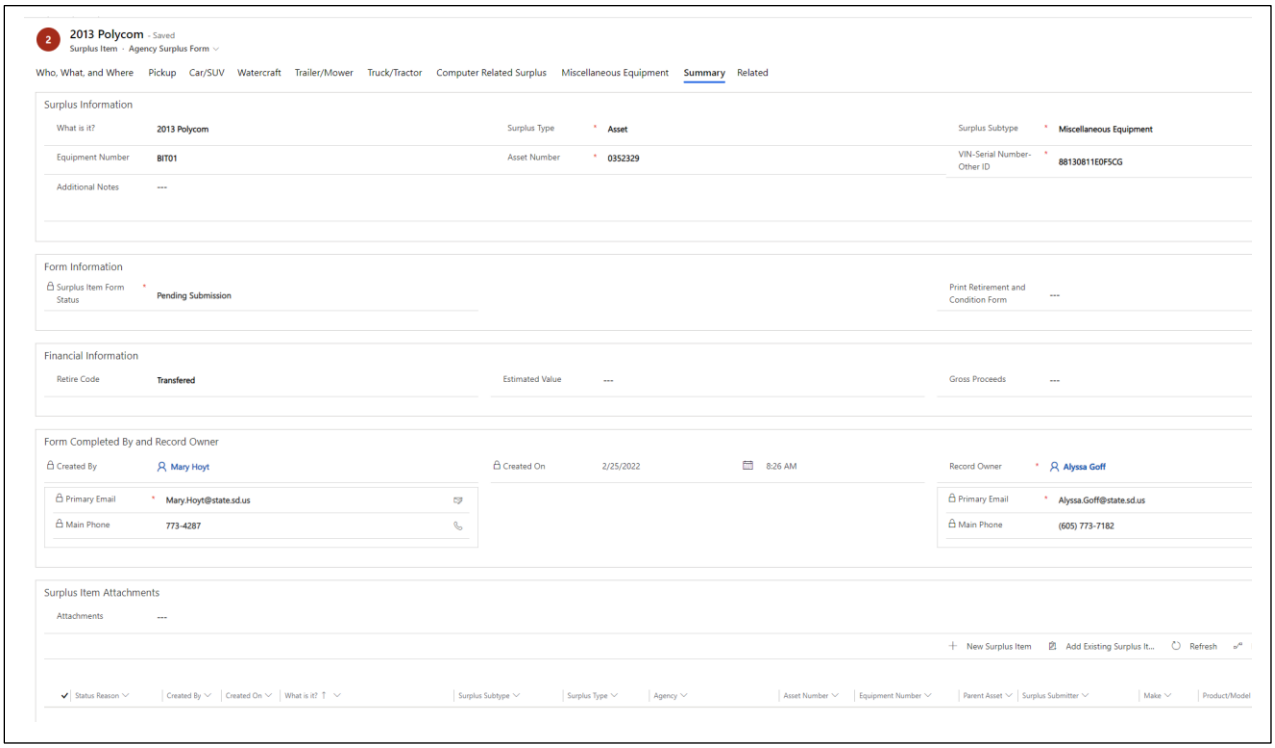


- To add images, the record must first be saved
- The supported file types are gif, png, bmp, jpg, and jpeg
- You can add up to five photos

1) **Does this have attachments?:** Use the dropdown to indicate if the surplus item has attachments
2) **+ New Surplus Item:** Click on the + to add an attachment and repeat the [Add Surplus] process

Summary

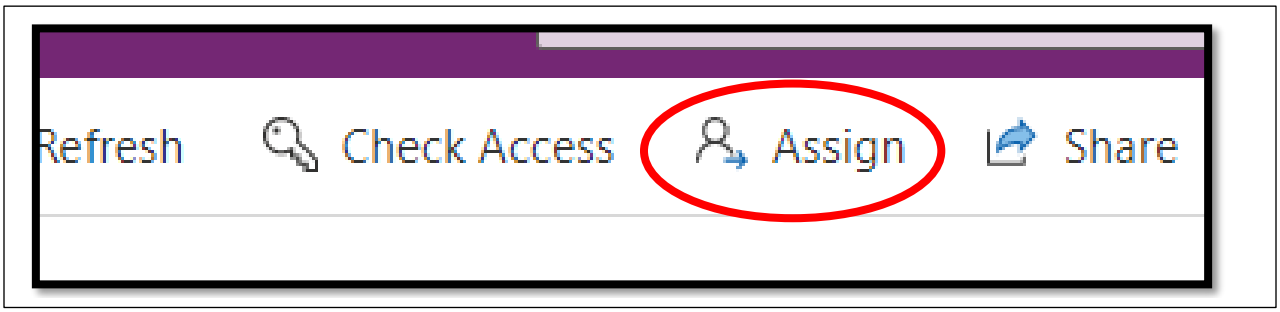
This tab is mainly informational. You can select the ***Retire Code*** and ***Estimated Value*** in this section.



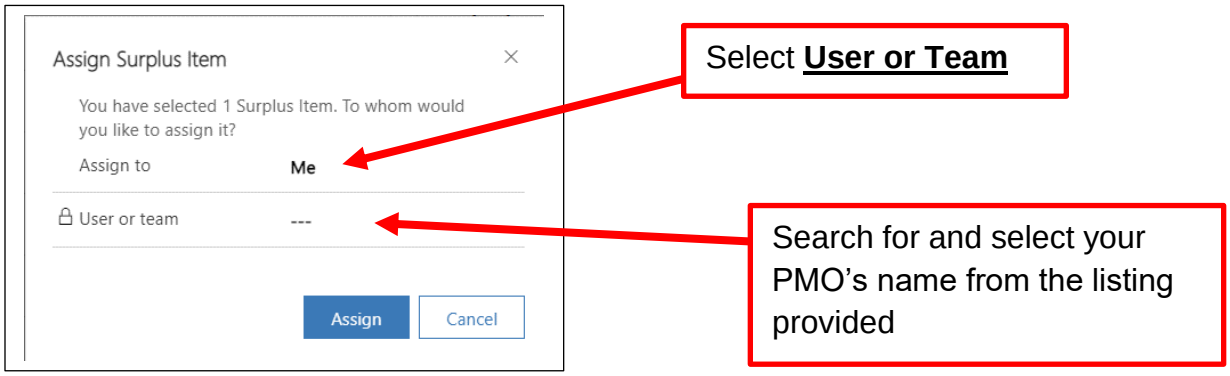
How to Submit Surplus Asset Form to my Property Management Officer (PMO)

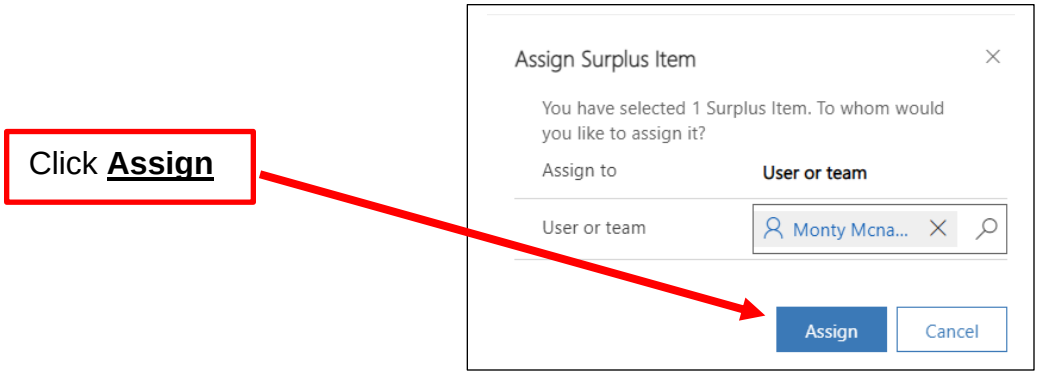
Authorized Users must submit the Surplus Item Form to their PMO's before the form can be submitted to BOA.

Step 1: *After you have completed your form, select* ***Assign*** *in the top command bar of the record*



Step 2: *A pop-up will appear giving you the ability to assign the form. Select* ***User or Team*** *from the Assign to drop-down and enter in the name of your PMO in the User or Team field, and click* ***Assign***



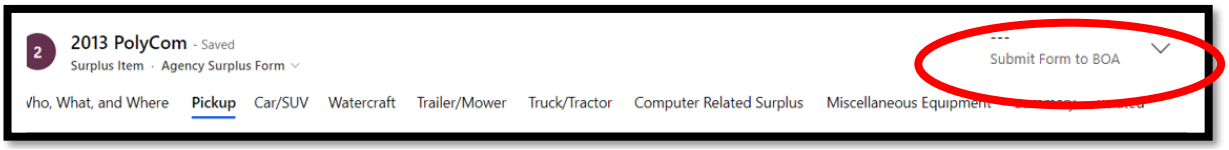


How to Submit the Surplus Asset Form to BOA

Only the PMO can submit the form to BOA. Forms can be assigned individually after review or all at once

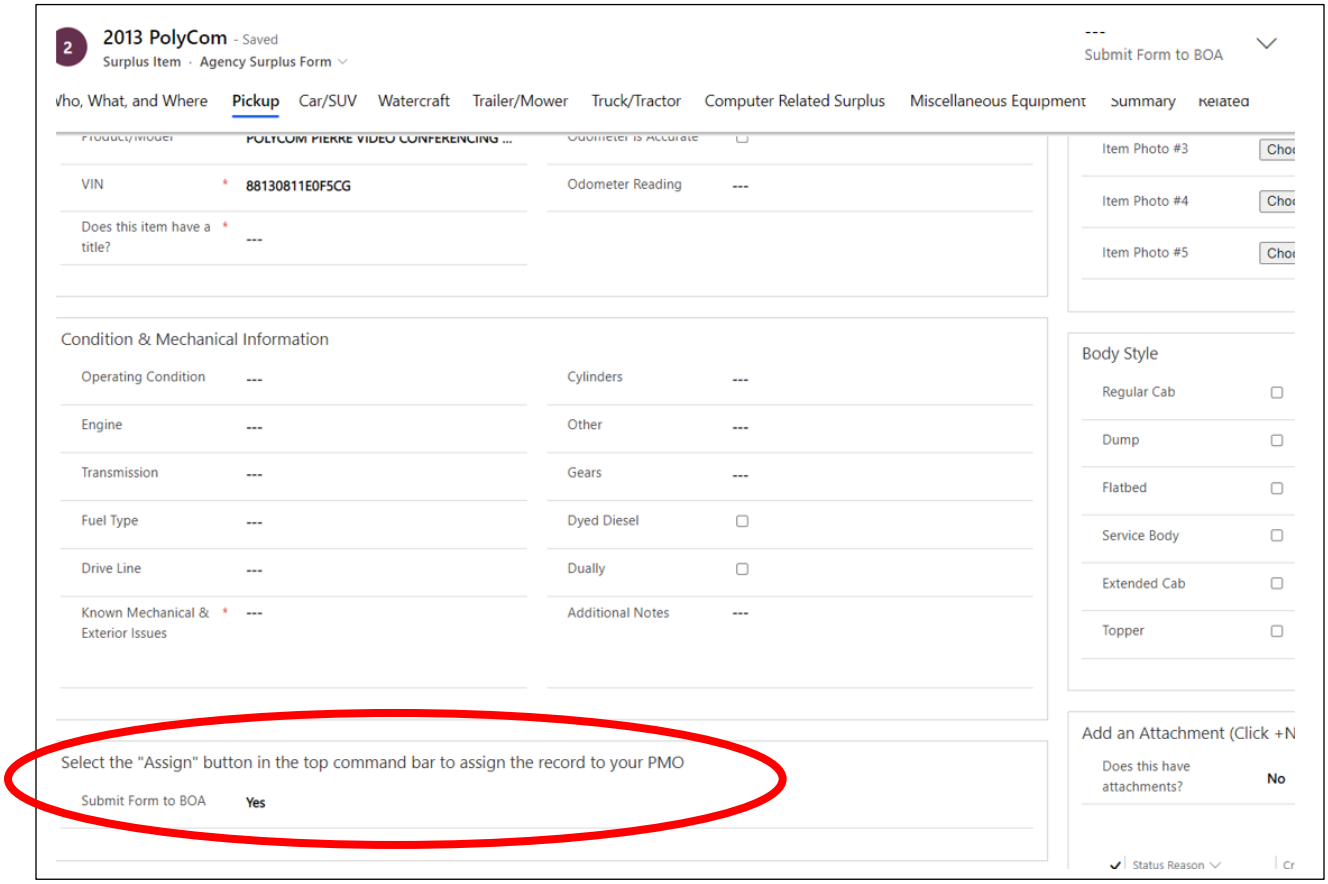
Submit an Individual Record

At the bottom of the applicable Subtype tab, select ***Yes*** from the *Submit Form drop-down* in the top right corner of the record and click ***Save*** in the top command bar

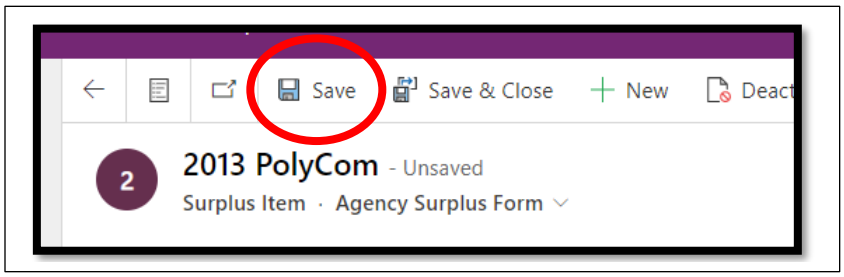


OR

Scroll down in the applicable subtype tab and select ***Yes*** from the *Submit Form drop-down* of the record

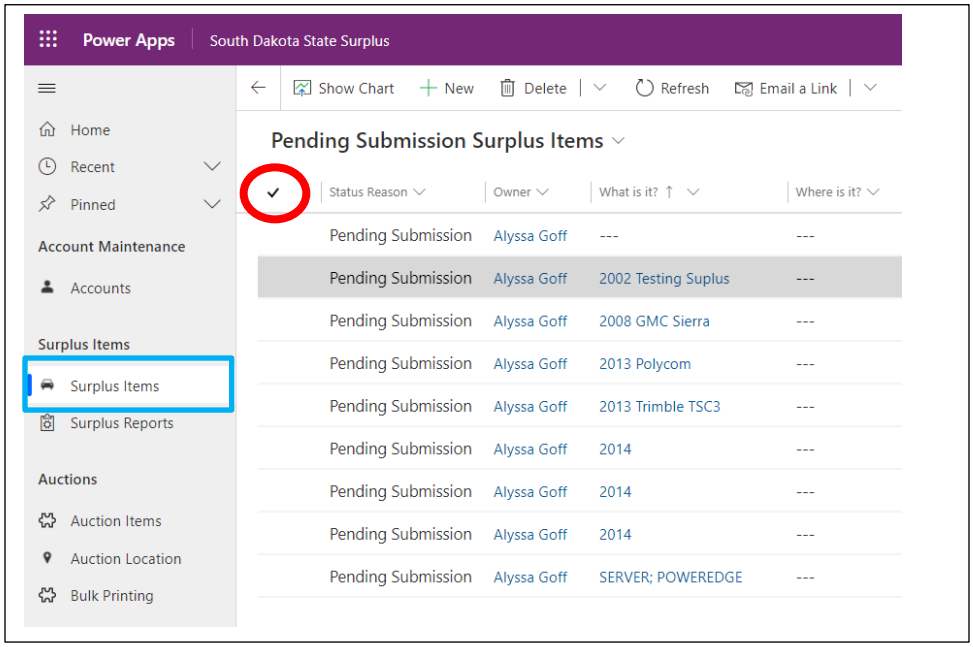


Click ***Save*** in the top command bar and the form has been submitted

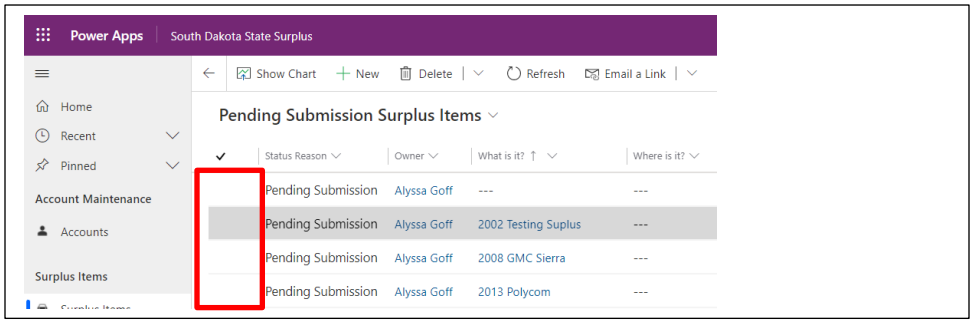


Submit Multiple Records

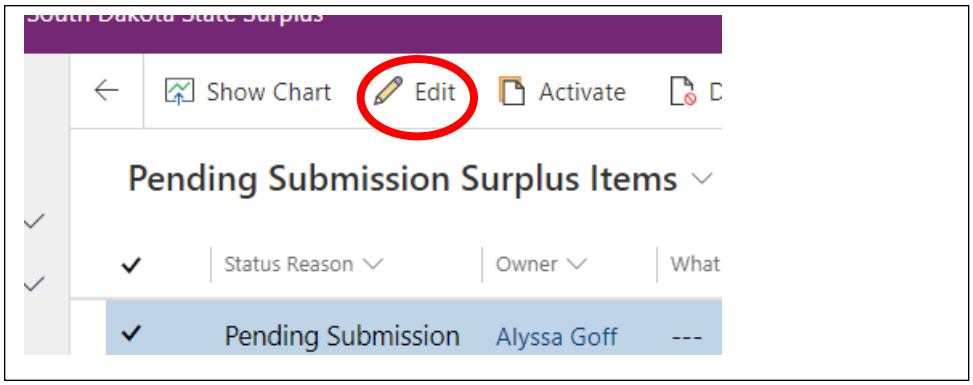
On the *Surplus Item page, select* the ✓ in the top of the *Pending Submission Surplus Items Listview*. This will select all the records in the listing.



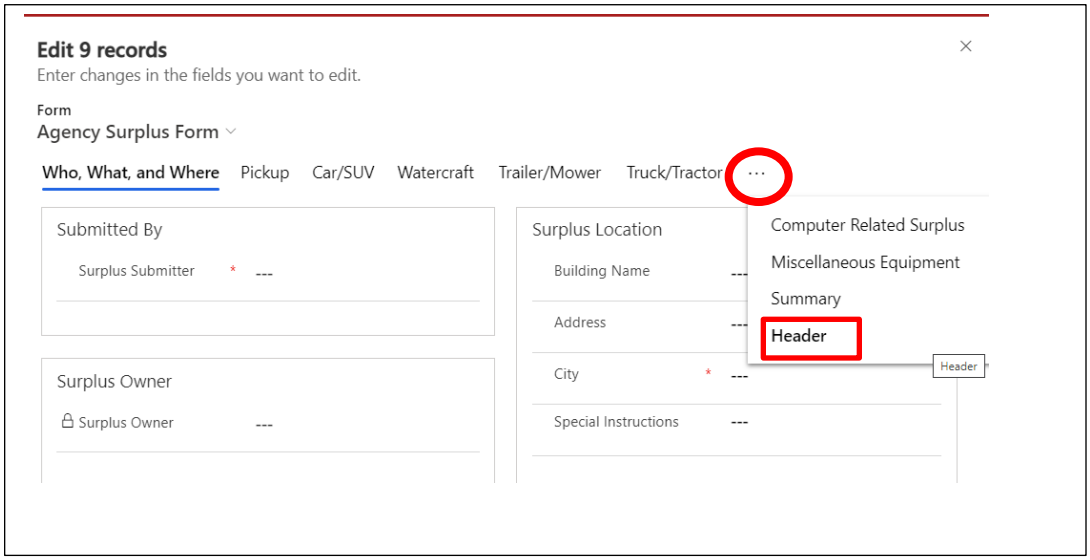
You may also select individual records by clicking on the empty space beneath the checkmark on the desired record(s)



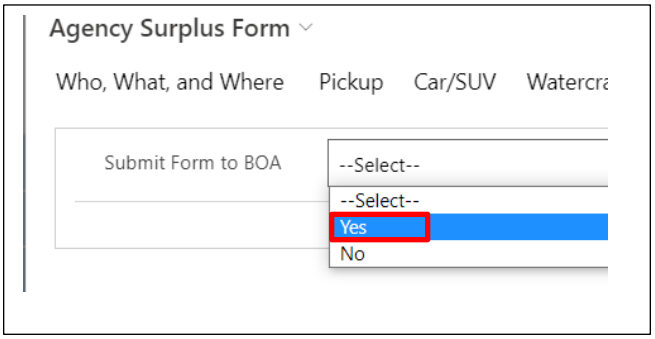
Click ***Edit*** in the top command bar of the page



A panel will open on the right-hand side of the screen. Click on the three ... and select ***Header*** from the listing



Select ***Yes*** from the *Submit Form to BOA* and click ***Save*** in the bottom right-hand corner of the panel

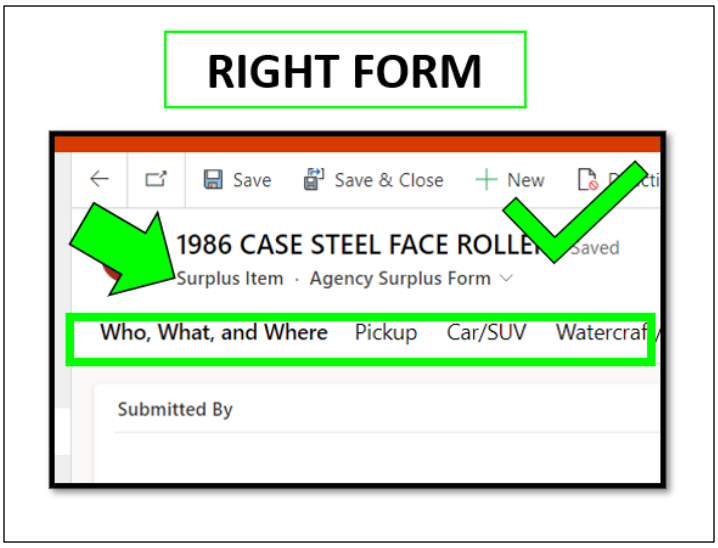


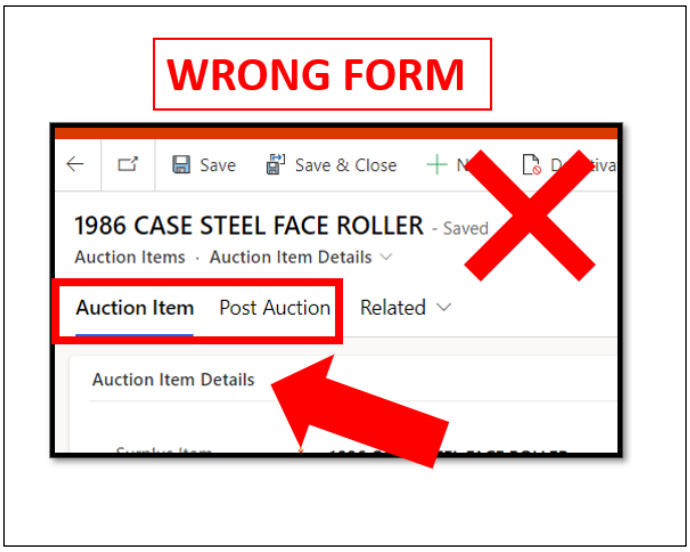
How to Print the Retirement and Condition Form

In some cases, you may want to have a hard copy of the Retirement and Condition form after you have added your surplus items.

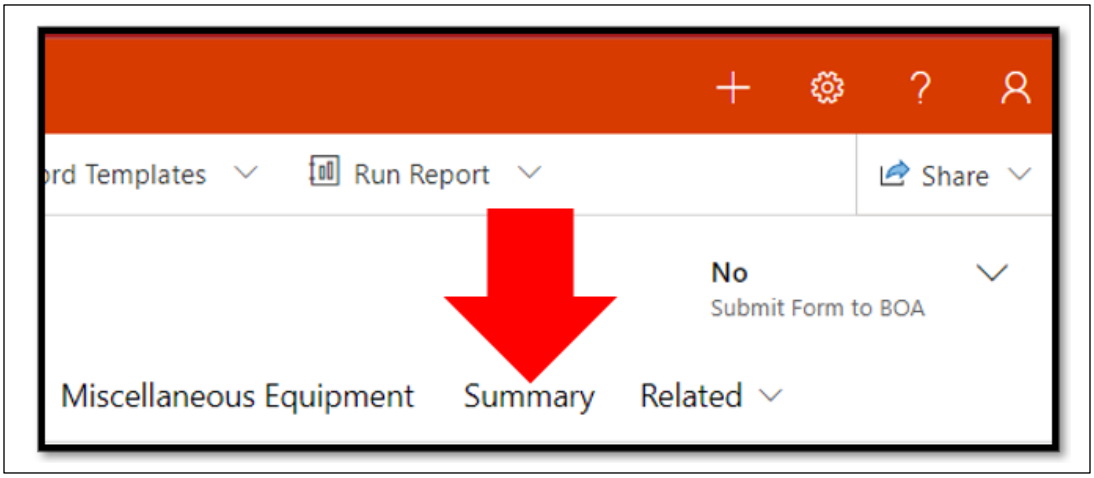
****If your surplus item has attachments, you will need to print a separate retirement and condition form for each attachment. ****

Open the record of the document you wish to have a copy of the Retirement and Condition form. Make sure that you are opening the ***Surplus Item*** *record* and **NOT** the *Auction Item* record.



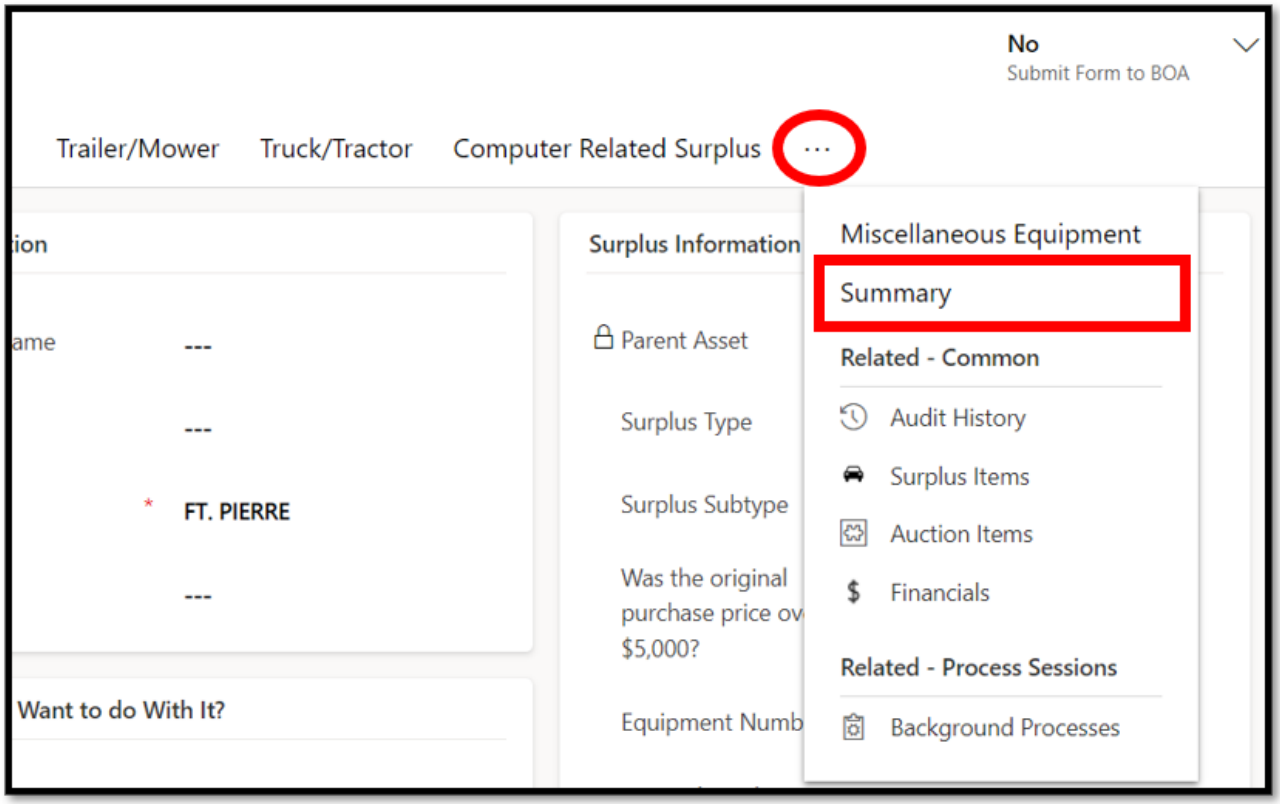


Navigate to the ***Summary*** *tab* of the form. You will find the Summary section on the far right-hand side of the screen.

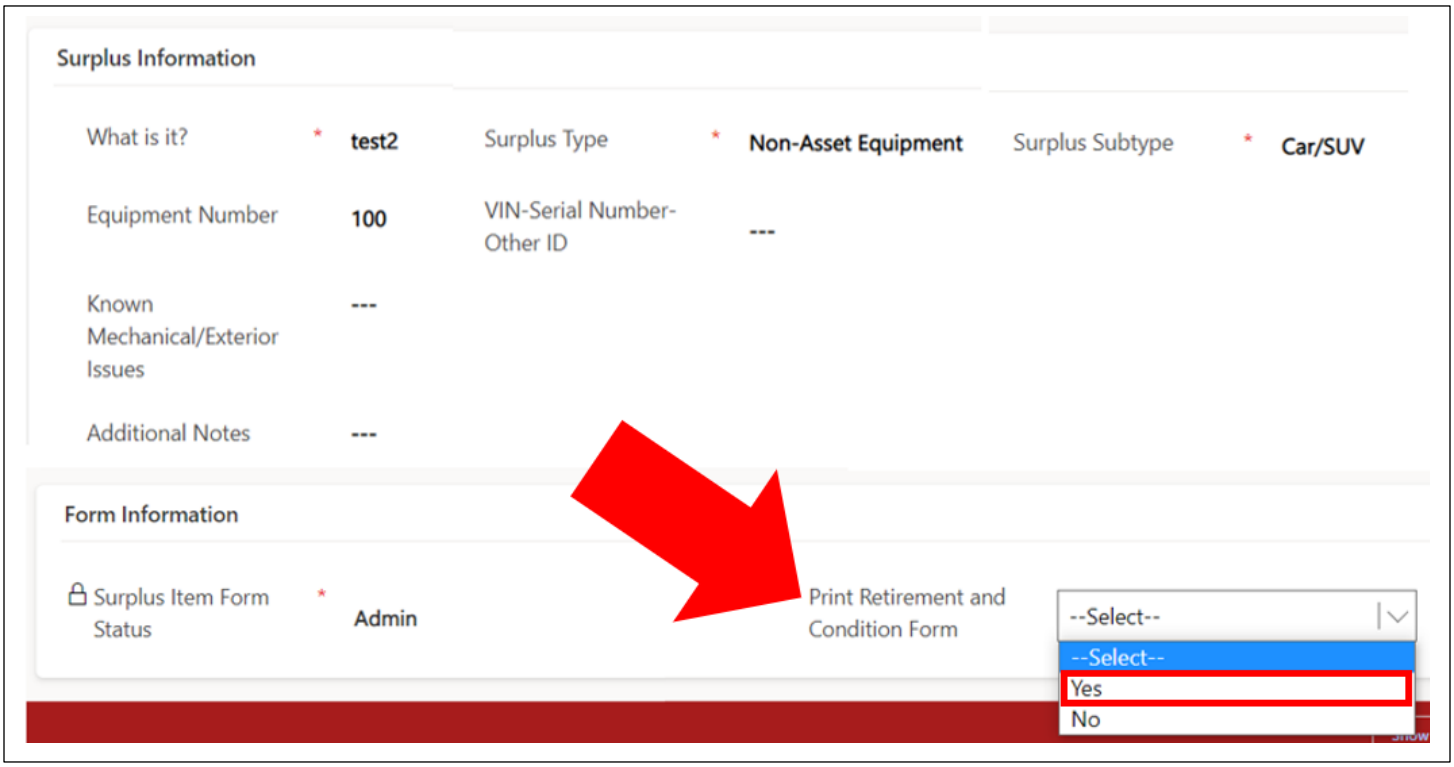


PLEASE NOTE

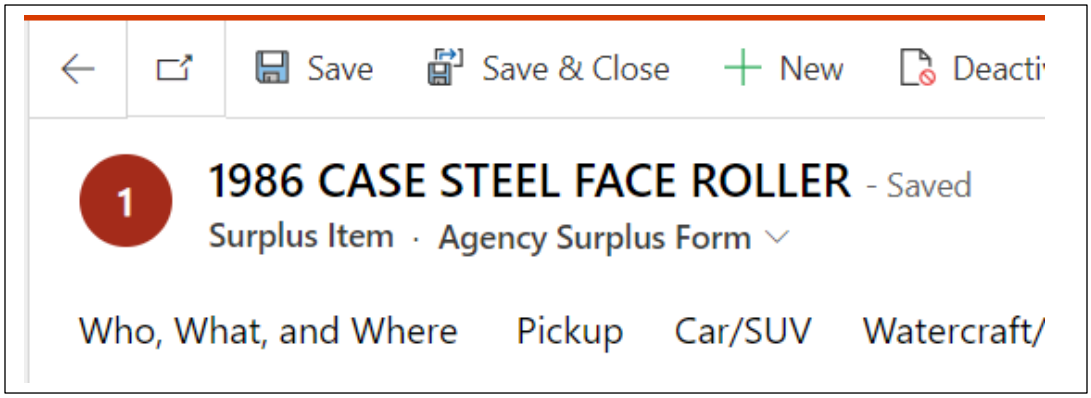
When you open the Surplus Item, you may not see the *Summary* tab. The size of your computer may alter the appearance of the form. If this happens, there will be three ellipses (…) on the far right-hand side of the screen. Click the ellipses and then select *Summary.*



On the ***Summary*** page, scroll down until you find the section titled ***Form Information***. Click the dropdown and select ***Yes***.

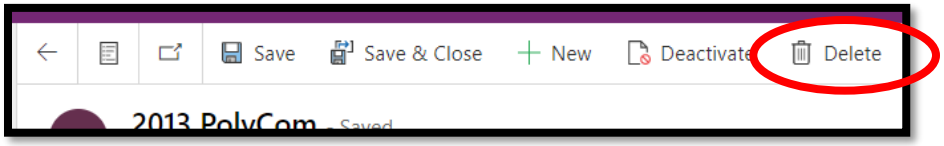


Click ***Save & Close*** in the top command bar of your screen.



After approximately 10 minutes, you will receive an email with a copy of the Retirement and Condition form attached.

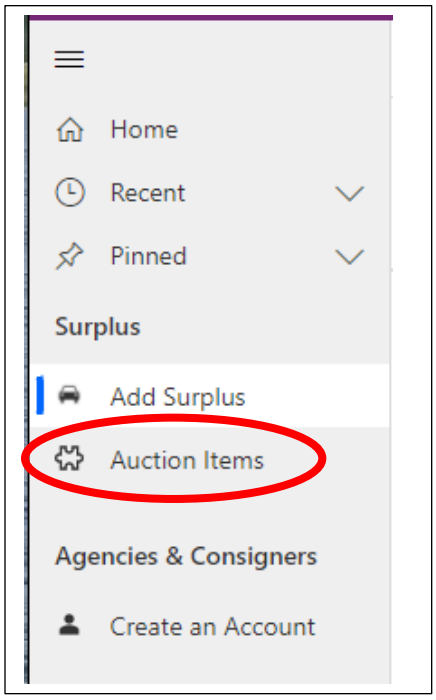
Surplus Item Form FAQ

1) What if I enter the wrong Asset Number in FAS and the wrong information is pulled from FAS?
    a. *You will need to delete the record using the **Delete** button in the top command bar of the record*
    b. 

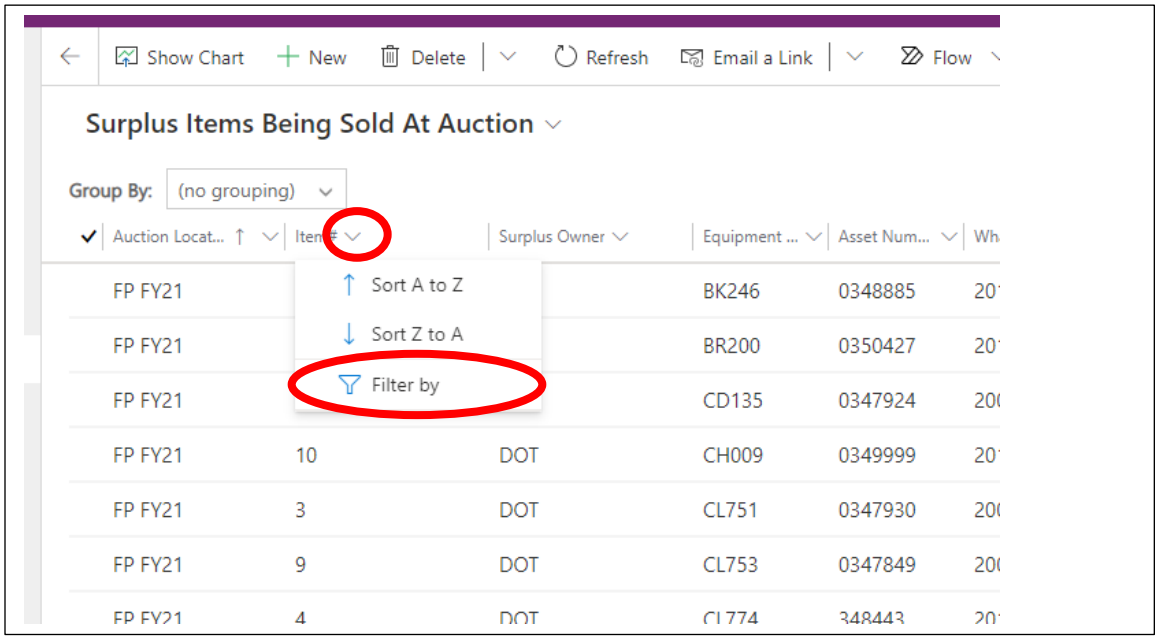
2) Can I submit my form to BOA on behalf of my PMO?
    a. *No, only the PMO can submit the form to BOA*
3) Does my property management officer (PMO) get notified when I submit the form?
    a. *No, you will need to work with your PMO on how they would like to receive this information*
4) Can I make changes to my form after it has been submitted to BOA
    a. *No, you need to contact BOA if any corrections need to be made*

View Auction Items

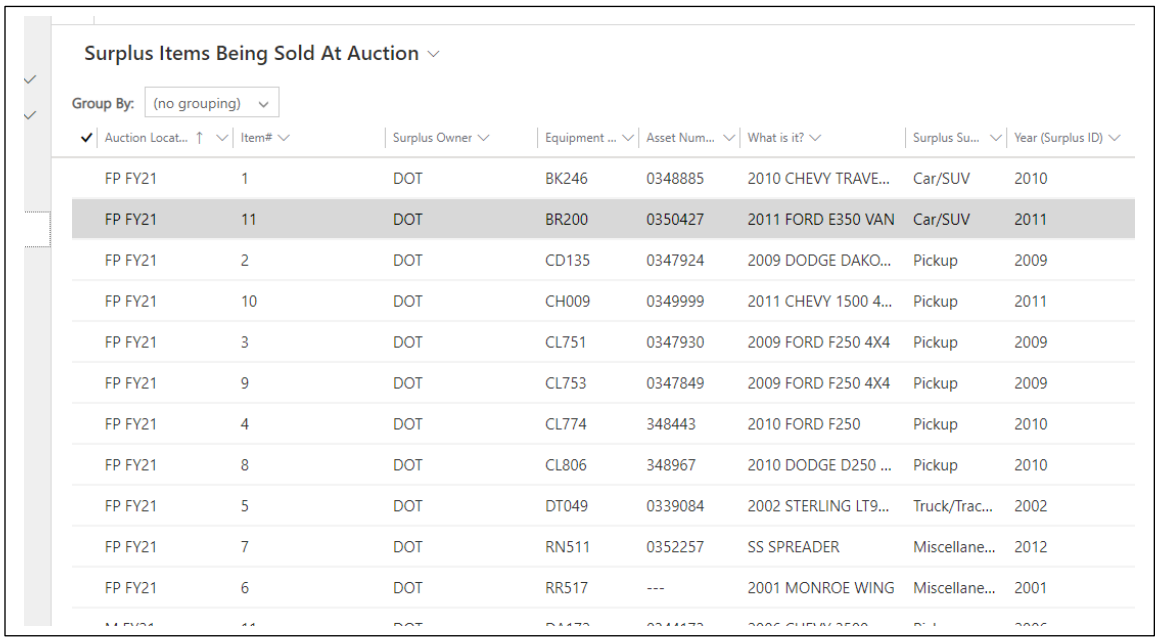
When you want to see items that are up for Auction you can do so by selecting ***Auction Items*** in the left-hand navigation tree



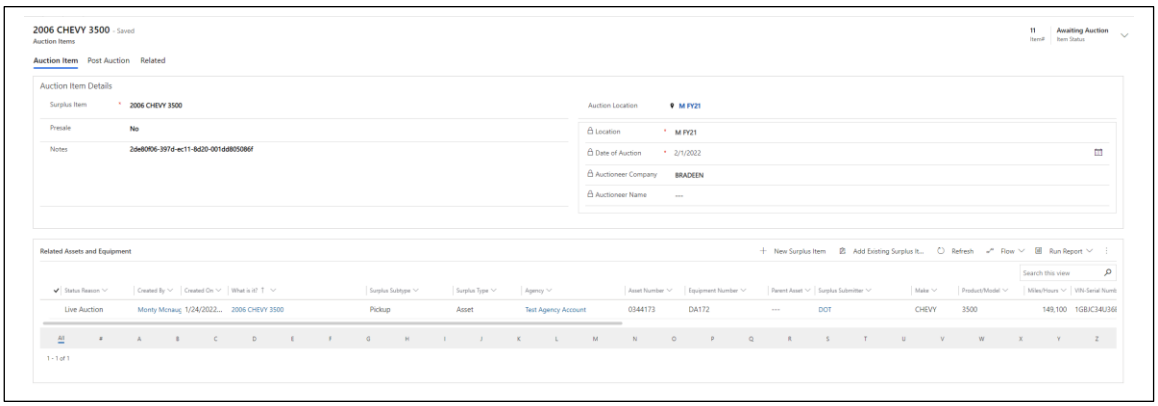
Use the filter bars by narrowing down what you are looking for by selecting the carrot of the desired filter in the grid headers

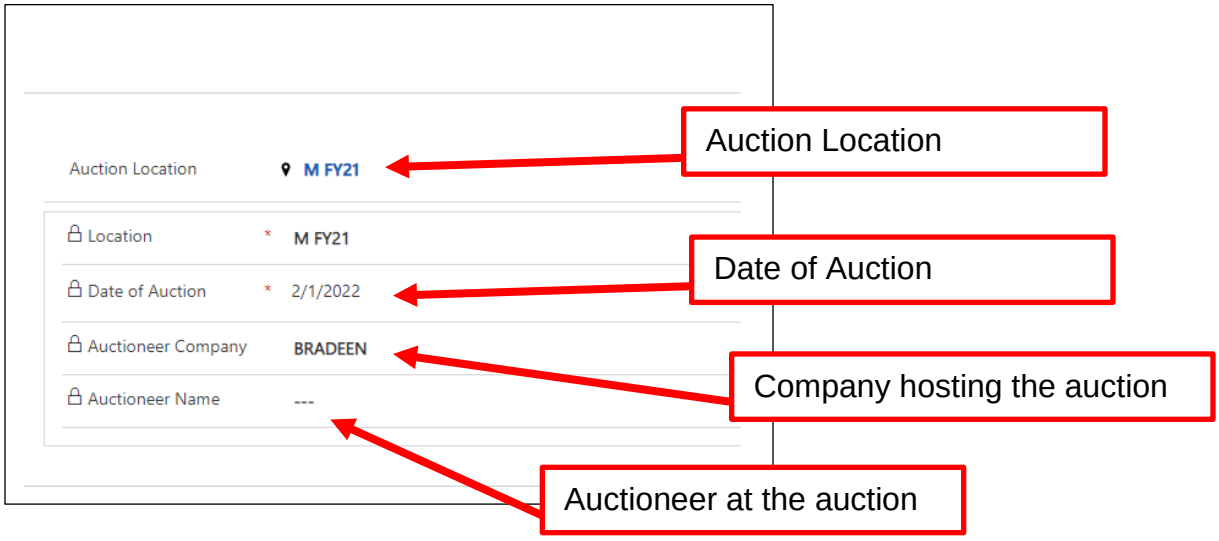


Double-click on a record to get further detail on the item being sold at Auction

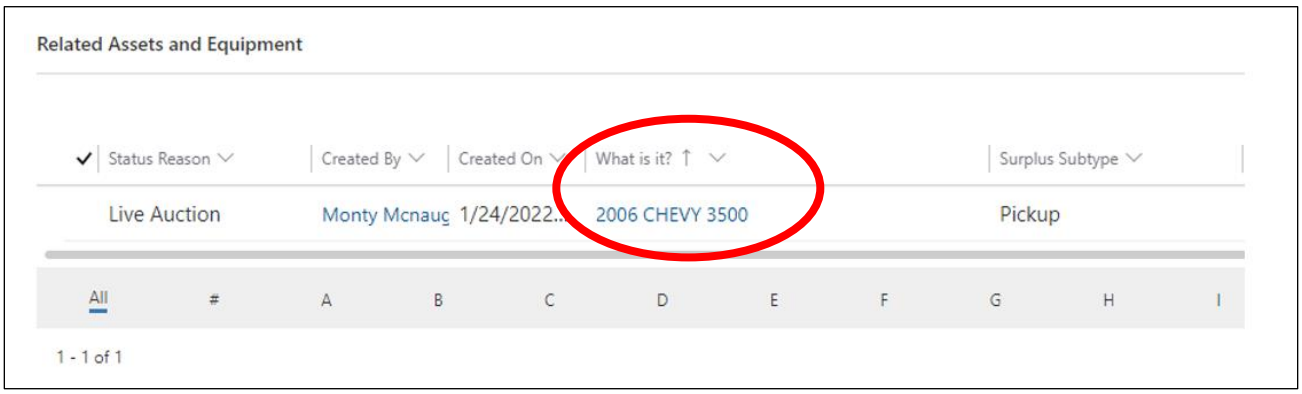


When you open an Auction Record, it will look like this



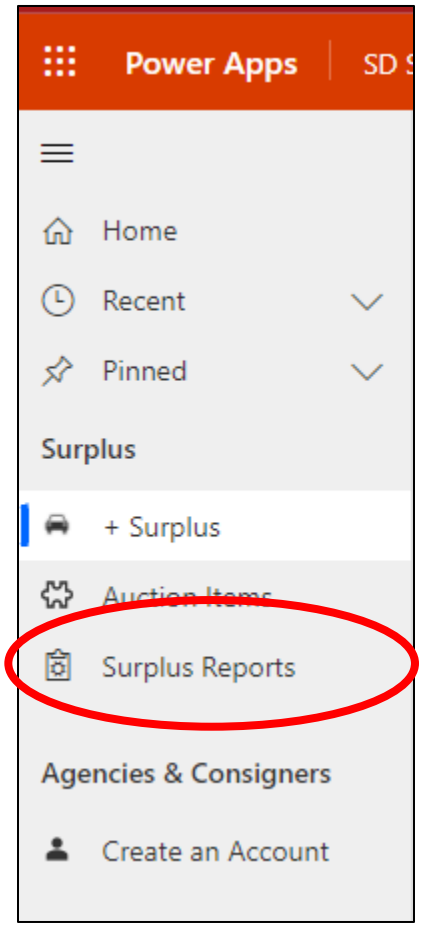


Click on the link below ***What is it?*** in the ***Related Assets and Equipment*** *grid* to be taken to the Surplus Record and get more information on the item(s) for sale

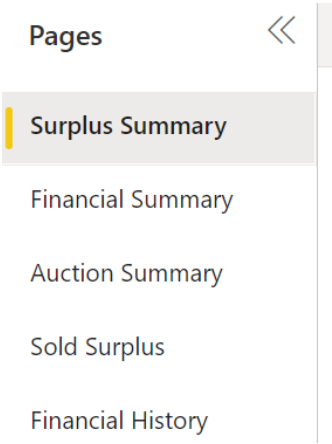


Reports

Reporting information is available via Power BI. In order to access these reports you must have access to them. To reach the reports select ***Surplus Reports*** on the left-hand navigation tree

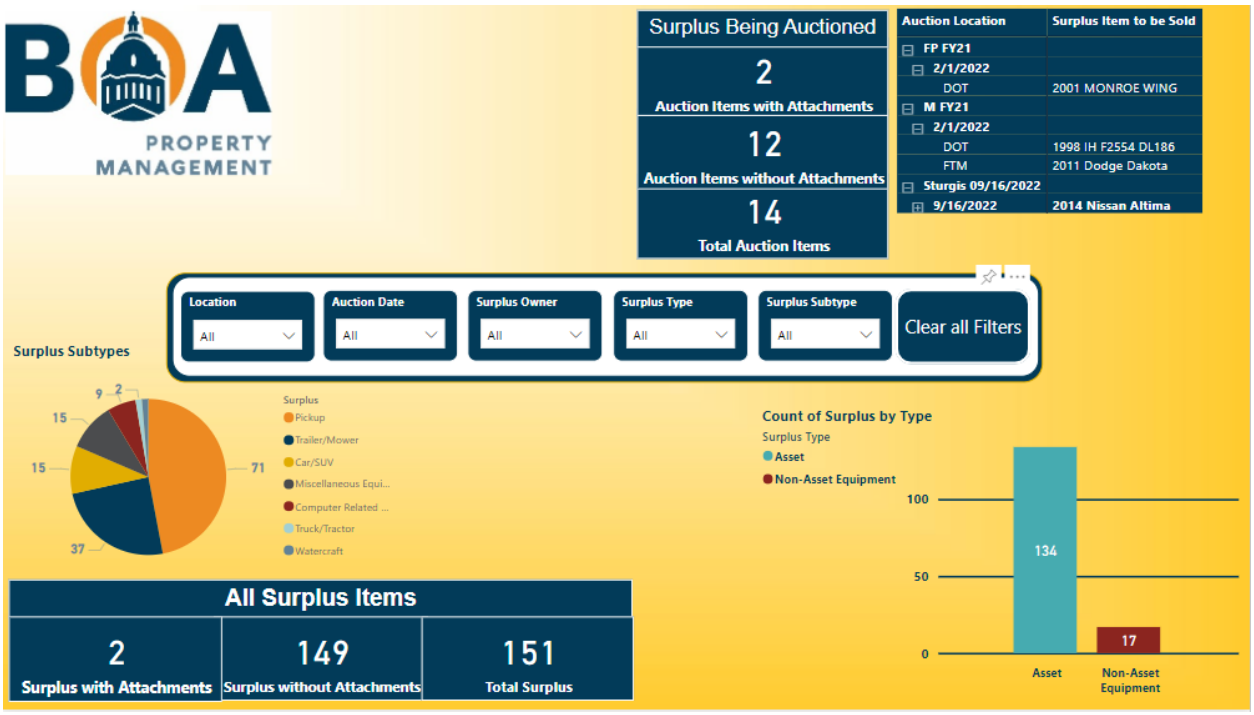


The reports will open in a new tab. You may select one of the five reports available using the *Pages panel* on the left-hand side of the screen



Surplus Summary

This page provides a summary of all the surplus going to auction and all of the surplus within the system as a whole



Financial Summary

The financial summary will show the reimbursements your agency has received from the surplus sold at auction